

SNOHOMISH COUNTY

STRATEGIC TOURISM PLAN

2018-2022

RESONANCE 
 **BERK**

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CONTENTS

Foreword.....	5
Introduction	6
Executive Summary.....	7
Performance Goals.....	22
Strategic Tourism Plan	24
1. Destination Marketing and Promotion.....	25
1.1 Marketing, Promotion and Advertising	26
1.2 Branding	29
1.3 Tourism Research	33
1.4 Website and Social Media Engagement	35
1.5 Public Relations and Communications.....	37
1.6 Meetings, Conventions and Groups Marketing and Sales	39
1.7 Sporting Events Marketing and Sales	41
1.8 Visitor Services	43
1.9 Collateral Materials.....	45
1.10 State-wide Cooperation.....	46
1.11 Industry Education.....	47
2. Destination and Product Development	49
2.1 Sustainable Regional Destination Product Development, Marketing and Promotion	50
2.2 Regional Bike Trail Network, Facilities, Infrastructure, Amenities and Transport	54
2.3 Trails and Trail Town Development.....	56
2.4 Visitor Capacity Planning / Traffic / Transportation	59
2.5 Mobile Connectivity and Open Data.....	61
2.6 Visitor Wayfinding.....	62
2.7 Lodging and Facility Options	63
2.8 Aviation District and Commercial Air Service	65
2.9 Events & Festivals	67
2.10 Seasonality	68
2.11 Infrastructure Investments/Gaps	69

CONTENTS (continued)

3. Cooperative Destination Marketing and Destination Product Development.....	71
3.1 Organizational Capacity and Alignment	72
3.2 Snohomish County Department of Parks, Recreation and Tourism (SCPRT).....	73
3.3 Snohomish County Tourism Bureau (SCTB)	76
3.4 Snohomish County Lodging Tax Advisory Committee (LTAC)	78
3.5 Snohomish County Tourism Promotion Area (TPA) Board.....	80
3.6 Lodging Tax Program/Project Funding.....	82
3.7 Strategic Tourism Plan and Annual Action Plans.....	84
Conclusion	86

Appendices

Importance of Travel & Tourism	88
Open Up	91
Destination Marketing and Management Roles and Responsibilities	95
County Executive and County Council.....	95
Snohomish County Department of Parks, Recreation and Tourism (SCPRT)	97
Snohomish County Tourism Bureau (SCTB) and Board of Directors.....	100
Snohomish County Sports Commission and Board of Directors	104
Snohomish County Lodging Tax Advisory Committee (LTAC).....	105
Snohomish County Tourism Promotion Area (TPA) and Board of Directors.....	107
Tourism Funding and Revenue Flows.....	110
Lodging Tax	110
Source of Funds.....	110
The Small Fund.....	110
The Large Fund.....	112
Fund Administration.....	112
Allowed Uses of Lodging Tax Funds	112
Use of Lodging Tax Funds	113
Award Process and Criteria	115
Tourism Promotion Area Fund.....	117
Public Facilities District Fund	118



CONTENTS (continued)

Strategic Tourism Plan Process 120

 Stage 1 - Strategic Conversations 121

 Stage 2 - 2010 STP Review and Performance Measurement..... 122

 Stage 3 - Consumer Research, Visitor Survey and Brand Assessment..... 126

 Stage 4 - Destination Assessment..... 141

 Stage 5 - Situational Analysis 144

 Stage 6 - Visioning Workshop..... 151

 Stage 7 - Recommendations and Review..... 153

 Stage 8 - Final Report 153

The 2010 Strategic Tourism Plan Review and Performance 154

Strengths, Weakness, Opportunities and Threats (SWOT) Analysis 165

Foreword

I am pleased to present the update of the Snohomish County Strategic Tourism Plan for 2018-2022.

As you will note, a lot of research, strategic thinking, time and effort has been invested to update this report and help Snohomish County continue to build its extremely important travel and tourism industry as a tool for economic development and job creation, and equally important to enhance the quality of life for our residents.

I would like to thank the many individuals and organizations that have contributed to this effort including the Strategic Tourism Plan Steering Committee, the Snohomish County Department of Parks, Recreation and Tourism, the Snohomish County Tourism Bureau, and the numerous public and private sector stakeholders that joined forces to provide input during the many project activities, conversations, workshops and visioning sessions.

Based on the strength of vision and consensus that this project has created, we should all be proud and grateful.

Although this important project is complete, I would like to encourage all travel and tourism professionals, government officials and employees, board and committee members to continue building on this success and work in collaboration and cooperation to help achieve the vision that has been set.

Snohomish County tourism delivers extraordinary experiences for visitors and residents and has great potential for enhancing its position, products, services and marketing. Working together will make this a reality.

Best regards,

Tom Teigen
Director
Snohomish County Parks, Recreation & Tourism

Introduction

In late 2016, Snohomish County initiated a project to update its 2010 Snohomish County Strategic Tourism Plan and provide a guiding document for the county to make continued and future strategic investments in assets, infrastructure and services that support and enhance the county's visitor industry.

The updated plan was to build on the goals and accomplishments of the 2010 plan and work, to build on the strengths of the county's tourism experiences, assets, and destinations, while incorporating new activities, sectors and approaches that are emerging as important growth areas for county tourism.

To produce this plan, the county engaged a partnership of two consulting firms: Resonance Consultancy LLLP (New York and Vancouver) and Berk Consulting (Seattle) to undertake a series of research activities, industry engagement, visioning workshop and report writing to assist the county with the updated plan.

The following document summarizes work by Resonance and Berk (see Appendix) including their: strategic conversations with public and private sector industry stakeholders from around the county to understand their perspectives and engage them in the project; review of the 2010 Plan detailing accomplishments and ongoing activities; consumer research, visitor survey and brand assessment to provide context for future strategies; an assessment of Snohomish County vis-a-vis its competitive set to identify destination strengths, weaknesses, opportunities and threats; and a Situational Analysis to set forth issues and opportunities to be considered by industry stakeholders in a visioning workshop.

The results from the visioning workshop led to a series of recommendations and draft report presented to county authorities for review and consideration. Following feedback and input from the county and other stakeholders, this final report has been delivered.

Also included in the Appendix is an overview of key government officials, staff, boards, commissions and a bureau that are directly involved in the planning, development, marketing and promotion, and execution of tourism-related activities, and the roles and responsibilities they have for Snohomish County tourism. The report includes recommendations to update these roles and responsibilities and how the entities should collaborate and work together to best implement the Strategic Tourism Plan.

Also included in the Appendix is a summary of the revenue sources, purposes and uses of two tourism funding mechanisms - Lodging Tax and TPA Assessment - that are used to fund county tourism activities including tourism marketing and promotion and destination and product development. Recommendations on future uses of these revenue sources are also identified.

And most importantly, this report includes a detailed presentation of rationale, strategies, plans and performance measures associated with destination marketing and promotion, as well as destination and product development to carry Snohomish County tourism into the next decade.

Please note, as with all long-term plans, these strategies are subject to change, in order to account for and adjust to urgent threats or burgeoning opportunities.

Executive Summary

The Strategic Tourism Plan for 2018-2022 sets a new standard for the tourism industry in Snohomish County, Washington.

First, it celebrates the impact that tourism has in the county from overnight and day-trippers, generating approximately \$1 billion of spending, creating 20,000 direct and indirect jobs, and \$100 million of state and local revenue. Next, it sets a clear course for future growth, building on a strong regional economy and significant potential for building new tourism product and attracting new tourism demand. Finally, it bridges the gap between various government agencies and offices, boards and committees, cities and towns, and tourism businesses around the county to deliver a collaborative call to action, bringing these groups and individuals together under one set of guiding principles, one set of realistic goals, one brand, one clear strategy and one collective vision for Snohomish County tourism.

Vision for Snohomish County Tourism

There has been a lot of thought given to creating a vision statement for Snohomish County tourism that incorporates its many positive attributes, qualities and characteristics including but not limited to:

- The county's Pacific Northwest beauty and scenery from seashore to mountains
- A wide range of amazing outdoor recreational activities and experiences for visitors and residents
- The many trails and communities forming connected regions that showcase the natural environment, people and places
- The diverse offering of historic, cultural, and artistic activities, plus engaging events / festivals for visitors and residents to enjoy
- Friendly, caring, small town hospitality that welcomes and serves a diverse group of guests including overnight visitors and day-trippers
- The collaborative spirit of public and private sector tourism stakeholders, and federally recognized tribes, which have come together to create products and services that are exceptional, high quality, environmentally responsible and culturally sensitive
- A tourism marketing and promotional effort growing in sophistication and skill that tells inspiring stories about Snohomish County experiences, places and people

At the end of the day, the Vision Statement tried to capture it all...

Vision Statement

Snohomish County is a scenic and culturally rich destination where genuine hospitality is fostered through public / private collaboration that inspires people to explore the outdoors from the Salish Sea to the Cascade Mountains and engage in outdoor recreation, arts and cultural experiences.

Guiding Principles and Goals

Tourism is a vital function of economic development. Economic development doesn't create jobs – rather its function is to create conditions where jobs and business thrive in healthy communities. With the Vision set, this Strategic Tourism Plan sets forth a series of Guiding Principles that serve as a foundation for the Strategies, Plans and Programs that follow, and which allow all tourism stakeholders (government officials and staff, private sector leaders, tourism organizations and agencies, business owners and residents) to know how to organize sustainable tourism for economic development and growth in the County, the economy, the industry, its visitors to improve quality of life for local residents.

- The tourism sector will continue to contribute significantly to Snohomish County's economic development effort for a diverse, strong and growing economy, that supports direct and indirect jobs, investment and government revenue.
- The tourism sector will seek to enhance the quality of life for Snohomish County residents and diminish any negative impact that tourism-related activities and traffic may have on natural resources, everyday life and enjoyment.
- Snohomish County will achieve sustainable tourism growth by concentrating efforts on those products and markets with a socially equitable approach, including promotion of the diverse range of rural nature-based, urban, recreation / adventure, and indigenous cultural experiences, as well as organized sports and conference opportunities available in Snohomish County.
- Destination development activities will focus attention and resources in those areas of the county that combine environmental stewardship, attractive product / service opportunities for visitors and economic development opportunities for local residents.
- Snohomish County will manage its professional, creative and competitively funded tourism marketing agency to promote the destination to a regional, national and international market of interested overnight visitors and day-trippers.
- Snohomish County will promote and facilitate regional collaboration and partnerships between the county, cities, towns and community organizations, federally recognized tribe (Tulalip Tribes of Washington, Sauk-Suiattle Indian Tribe, Stillaguamish Tribe of Indians), as well as industry sectors and tourism businesses, to ensure they are able to capture, sustain and support Snohomish County's competitive advantage.
- Snohomish County will seek to become a premier destination for environmentally and fiscally sustainable recreation and tourism.

- Snohomish County will strive to be a business-friendly jurisdiction in which to operate a tourism business.

Though the Guiding Principles may be hard to gauge, the Goals are more tangible and concrete. Snohomish County tourism stakeholders should be able to look at the results and immediately know if the goals for this update have been met. In this regard the Goals for this Plan are focused on economic metrics, tourism industry and hospitality metrics, funding levels, well known marketing impact measures, organizational measures and social media / resident awareness metrics.

Brand

Another key consideration for this Strategic Tourism Plan is the Snohomish County tourism brand - Open Up - that was formally rolled out in 2013.

Research conducted for the branding revealed that Snohomish County's greatest asset is its access to the outdoors. The three descriptors that were most often given for the area included 'beautiful,' 'recreation' and 'proximity to Seattle,' which paint a clear picture of Snohomish County assets.

Further, the county's location between Seattle and Canada along I-5 offers visitors a quick escape route to the great outdoors and a chance to explore the natural beauty of Washington State. Because our current visitors and our targeted visitors (see Trending Markets) are pursuers of active lifestyles, it's fitting that Snohomish County offers a diverse number of accessible recreational pursuits from beginner to advanced and works with communities to help them learn about, service and capture revenues from these targeted visitor markets. Truly, all of Snohomish County's primary experiences – outdoor adventure, recreation, aviation, shopping, business and event-based visitation, gaming, and sports, fit under the umbrella idea of increasing environmental consciousness and getting outside.

Trending Markets

Looking to the future, global and national travel tourism trends suggest that Snohomish County has a competitive advantage to attract a number of growing visitor markets, so this plan suggests a number of marketing and promotional activities to expand Snohomish County's tourism brand to target these visitors. The plan also suggests strategies for sustainable destination and product development needed to support the experiences these visitors come to Snohomish County to enjoy.

Millennials

Millennial travel spending has grown 30% since 2007, and Millennials now account for 20% of all travel spending around the globe. Millennials are far more interested in international travel than non-Millennials, and they are also more interested in urban destinations than resorts and countryside vacations. As they are marrying and having children later in life, Millennials are more likely to travel for leisure in an organized group, with extended family or with friends.

Opportunities addressed in this Plan

U.S. Millennials will soon eclipse Baby Boomers in terms of total tourism-related spending and will be the largest demographic cohort. Snohomish County should evaluate its attractions and product offerings to identify resonant product and programming for this demographic and adjust its marketing positioning accordingly.

Multi-Generational Travel

Fewer adults are traveling with children. In 2012, 26% of domestic leisure travelers travelled with children under the age of 18 (408.5 million trips) compared with 2008, when 31% of adults travelled with children (466.2 million trips) however, 40% of families went on a multigenerational vacation in the past year.

Today's seniors are living longer, healthier and more mobile lives and are eager to make up for lost time and long distances away from their beloved grandchildren. In fact, grandparents travel almost 25% more than the average leisure traveler.

Opportunities addressed in this Plan

Snohomish County must be prepared with infrastructure, products, services and marketing to target and attract the multi-generational travel market.

Active Adventurers

The value of the global outbound adventure travel sector was more than \$345 billion in 2012, while growth in adventure travel has accelerated at a 65% yearly rate since 2009. More importantly, nearly 54% of travelers are planning an adventure activity on their next trip. Adventure travel includes two of three criteria: first, connection with nature; second interaction with culture; and third, a physical activity. Soft adventure options include hiking, kayaking, rafting, snorkeling, volunteer tourism and archaeological expeditions, while hard adventure options include caving, climbing, heli-skiing, kite surfing, trekking and paragliding.

Opportunities addressed in this Plan

Snohomish County must be prepared with infrastructure, products, services and marketing to target and attract the active adventure travel market.

Bleisure (Business-Leisure)

According to a U.S. report published by Orbitz in 2012, 72% of business travelers said they take extended executive trips that have a leisure component. Another study by Egencia reports that 54% of 18 – 30 year olds bring a significant other on a business trip, versus 36% of 31 – 45 year olds and 16% of 46 – 65 year olds.

Opportunities addressed in this Plan

Snohomish County must be prepared with infrastructure, products, services and marketing to target and attract the bleisure market.

Shopping Tourism

Tourists spend approximately one-third of their total tourism expenditures on retail purchases, including add-on opportunities of the attraction / destination, general shopping experiences, and to experience local culture.

Historic market towns and neighborhoods tend to attract boutique and independent shops, while larger cities tend to attract major chains.

Opportunities addressed in this Plan

Snohomish County must be prepared with infrastructure, retail strategy, operations and marketing to target and attract shopping visitors.

Athletic Events

Major “spectator sports” and “participatory sports” events tend to shape the future of a place – it’s about legacy. Sports can also deliver significant one-time visitation or a continuing stream of visitors and revenue from visiting amateur, collegiate and professional leagues and associations.

Opportunities addressed in this Plan

Snohomish County must be prepared with infrastructure, product, services and marketing to target and attract the sports (spectator and participatory) visitor.

Walk ‘n Roll

Walking is one of the most popular vacation activities of U.S. travelers, with the popularity of bike share programs growing throughout the country. Cycling is growing the fastest with young consumers – 4.36 million young adults (18-24) participated in cycling in 2012 versus 2.8 million in 2008.

Opportunities addressed in this Plan

Trails and pathway development should be considered a key priority not only for the benefit of Snohomish County residents, but also as a major tourism development opportunity.

Collaborative Consumption

The growth of consumer sharing applications such as Airbnb and Uber has been exponential in the last few years. Airbnb has grown from 50,000 listings in 2013; Airbnb booked 4 million stays worldwide in 2012 and more than 11 million stays in 2013.

Opportunities addressed this Plan

Rather than view the growth of Airbnb as a threat, Snohomish County should identify opportunities to engage this audience as part of the destination’s tourism industry.

Collective and Collaborative Action

In undertaking this update of the Strategic Tourism Plan for Snohomish County, a vast number of industry stakeholders were engaged and participated in the many research activities, surveys, workshops and visioning exercises that served to inform the strategies and plans that have been set forth.

Individual perceptions and opinions were well expressed, plus organizational responsibilities and authorities were clearly articulated. The overriding message to the project Steering Committee and senior management from these stakeholders was that it’s time for individuals and various departments, agencies, organizations, boards and

committees, and destinations working in isolation and individual silos, to join forces to achieve travel and tourism's greatest potential benefit for the economy and residents of Snohomish County.

To aid this effort, the Strategic Tourism Plan will serve as the guiding document for a number of organizations, their tourism-related activities and funding including, but not limited to:

- Snohomish County Executive and Council
- Snohomish County Department of Parks, Recreation and Tourism (SCPRT)
- Snohomish County Tourism Bureau (SCTB) and Board of Directors
- Snohomish County Sports Commission and Board of Directors
- The County and City Lodging Tax Advisory Committees (LTACs)
- The Tourism Promotion Area (TPA) Board
- Towns, Cities and Committees

Enhanced Inter-Agency Collaboration

The Strategic Tourism Plan that follows recommends new connectivity and alignment between Snohomish County Department of Parks, Recreation and Tourism's (SCPRT) focus on sustainable destination and product development and the Snohomish County Tourism Bureau's (SCTB) focus on destination marketing, promotion and visitor services.

It is also suggested in the 2018-2022 Plan that these departments be co-located as soon as possible, allowing Snohomish County to build capacity, shape planning, communicate and sell visitor assets and experiences. In addition, the agencies will have greater ability to coalesce the many partners working together on large- and small-scale planning efforts. So too, by adding key staff in the areas of communications and destination development, the agencies will be better positioned to capitalize on the grass-roots efforts of regional work groups for greater impact and productivity.

Rural Tourism Development

While the county's tourism brand will expand and build awareness with marketing messages for our target markets, a large focus for the county remains on the socially equitable and environmentally conscious development needed to support rural communities where place-based tourism experiences are found. Planning and organization efforts that account for growing environmental impacts to natural habitat and infrastructure are needed to maintain manageable conditions and quality of life in these communities. These places specialize in farm-based experiences, local culinary and craft products – the natural companions to adventure and outdoor activities including cycling, hiking, rafting, climbing, birding, horse riding and more. These areas face challenges for planning, infrastructure for lodging, accessibility, marketing and social media but they provide the unique experiences that capture target market visitors needed to support tourism in the county overall. These activities must be sustainably managed to preserve natural environments and sense of place to ensure that visitation compliments and enhances communities rather than degrading them.

This Strategic Tourism Plan is deeply invested in opening doors to community engagement and sustainable tourism development by connecting with local stakeholders so that they may all communicate their unique

concerns for the social, cultural and environmental well-being of these remote and rural areas to one another and to those responsible for developing and promoting tourism opportunities throughout the county. The intent of the plan is to coordinate Sustainable Destination Development efforts through the Snohomish County Department of Parks, Recreation and Tourism (SCPRT), with the Destination Marketing and Promotions efforts of the Snohomish County Tourism Bureau (SCTB) to expand and streamline local engagement, participation and planning to assist the communities in their own sustainable tourism programming development.

Sustainable Regional Destination Development

Smaller than a state and obviously larger than a city, Snohomish County is spread over a vast 2,196 square miles. With 19 cities and towns spread along the coastline, scattered across rich agricultural land or offering edgy urban streetscapes, the sheer size and scale of the county is difficult for visitors to fully embrace.

A major lesson learned from the 2010 Strategic Plan was that focusing visitor attention towards regional destinations could not be successful without establishing a supply-side network to connect these place-based assets. As a result, the SCTB and SCPRT undertook a series of pilot programs for sustainable regional destination development focused on the river valleys in East and North County.

Through this process, the cities and towns in the valleys collectively created a vision with action plans, while industry experts addressed product development needs. The process was comprehensive and took a number of months to complete.

This updated Plan builds on lessons learned and foundations set by the pilot program by expanding the approach throughout the county. Taking cues from award-winning state-level programs, the Plan invests organizational resources from the SCPRT and the SCTB, and applies them to developing, enhancing and connecting the grass-roots efforts of cities and towns on a regional basis. Through regional facilitation, visioning, planning and workshops, outcomes of this approach will continue to help the tourism industry address regional strengths, weaknesses, opportunities and threats to their visitor markets; and provide greater ability for the SCTB and SCPRT to promote and support environmentally and fiscally sustainable visitor programming in these regions.

The Strategic Tourism Plan

The Strategic Tourism Plan is oriented around two major areas of work and responsibility:

1. Destination Marketing, Promotion and Visitor Services undertaken by the SCTB; and
2. Sustainable Destination and Product Development, undertaken by the SCPRT.

Destination Marketing, Promotion and Visitor Services focuses on the strategies, plans and performance measures associated with building tourism demand through efficient and effective marketing led by the SCTB.

Sustainable Destination and Product Development focuses on the strategies, plans and performance measures associated with capacity, stakeholder coordination and engagement needed to support environmentally and fiscally sustainable tourism experiences. This includes a joint focus on facilitating, and convening planning for infrastructure, product and operations of the destination led by the Sustainable Destination Development team within the SCPRT.

Regional destination identity, product, infrastructure planning and development will be connected as much as possible between the two organizations to grow and coordinate tourism efforts with investment for local communities and in the industry at large. These strategies, plans and performance measures are discussed throughout the plan.

The final section of the plan - Implementation Framework, Protocol and Funding - updates the framework for how tourism is structured in Snohomish County, how the organizations that are involved in the industry relate to each other and how funding should be organized to achieve the collective vision.

Each item presented in the Strategic Tourism Plan includes:

- **Rationale** for the issue or opportunity;
- **Strategy(ies)** to address the issue or opportunity;
- **Plans** to carry out the strategy;
- **Responsibility(ies)** for implementation; and
- **Performance Measures and Assessment** to gauge the work.

Destination Marketing and Promotion: The Snohomish County Tourism Bureau (SCTB)

The following Strategies, Plans and Performance Measurements are associated with Destination Marketing and Promotion. Although most of these activities are to be carried out by the Snohomish County Tourism Bureau (SCTB), there are some oversight responsibilities to be carried out by the SCTB Board of Directors, as well as the Lodging Tax Advisory Committee (LTAC), the County Executive and the Snohomish County Department of Parks, Recreation and Tourism (SCPRT).

Strategy for Marketing, Promotion and Advertising

The SCTB should continue to be a key partner in delivering exceptional tourism marketing strategies, programs and campaigns using an assortment of marketing channels and platforms.

Strategy for Branding

The SCTB should continue to be a key partner in the implementation and extension of the Snohomish County tourism brand.

Strategy for Tourism Research

The SCTB should collect, purchase, maintain and communicate basic and detailed tourism statistics, research and information (nationally, statewide and countywide) on a regular basis to monitor, identify opportunities / threats and educate / inform industry stakeholders on recent trends, current results and the future business outlook.

Strategy for Website and Social Media Engagement

The SCTB should continue to be a key partner in build and enhance its digital marketing, promotions and communications resources and delivery by investing in in-house technology, personnel and activities that are leading edge or by commissioning and managing an outside vendor(s) that can deliver a customized solution that achieves the county's digital goals and objectives.

Strategy for Public Relations and Communications

SCTB should continue to expand its use of Public Relations and Communications tools to position Snohomish County as a desirable travel destination.

Strategy for Meetings, Conventions and Groups Marketing and Sales

The Meetings, Groups & Packaged Travel sales group of the SCTB should continue to establish and develop Snohomish County as a premier destination (regional, state, national and international) for conventions, events and groups by conducting targeted sales efforts, providing quality servicing of event organizers and their events, and delivery of high quality travel and tourism products and services.

Strategy for Sports Events Marketing and Sales

The Snohomish County Sports Commission, sports division of the SCTB, should continue to establish and develop Snohomish County as a premier destination (regional, state, national and international) for amateur, collegiate and professional sports events and tournaments by conducting targeted sales efforts, providing quality servicing of event organizers and their events, and delivery of high quality travel and tourism products and services.

Strategy for Visitor Services

Snohomish County should seek to balance physical visitor information centers (permanent, mobile and special event) and their associated staffing and volunteers, and hard copy requirements, with the developing trend toward greater online and mobile phone technologies, applications and delivery of visitor information.

Strategy for Collateral Materials

The SCTB should continue to be a key partner in the production of visitor guides, maps, itineraries and other marketing collateral to inspire and guide existing and potential visitors to Snohomish County.

Strategy for State-wide Cooperation

The SCTB should create and maintain strong working relationships with State-wide partners including but not limited to Visit Seattle, Visit Bellevue Washington, Explore Kirkland, Explore Bothell and Visit Woodinville to explore, create and implement cooperative marketing programs for visitors seeking a range of experiences beyond county or city limits.

Strategy for Industry Education

The SCTB should continue to organize, facilitate and deliver industry development services with support from Snohomish County Parks, Recreation and Tourism (SCPRT) associated with travel and tourism marketing and

promotion, PR and communications and digital / social media engagement as well as quality customer service programs to county-based travel and tourism operators, government agencies and organizations.

Sustainable Destination and Product Development: Snohomish County Parks, Recreation and Tourism Department (SCPRT)

The following Strategies, Plans and Performance Measurements are associated with Destination Management including, but not limited to sustainable destination and product development. In general, these activities are to be carried out by the Snohomish County Department of Parks, Recreation and Tourism (SCPRT) in cooperation with Snohomish County Tourism Bureau (SCTB), the three federally recognized tribal nations, our 19 city and town partners, state and federal agencies, recreation and conservation organizations with other industry stakeholders countywide.

Strategy for Sustainable Regional Destination Development, Marketing and Promotion

SCPRT (with support from the SCTB) should organize, coordinate and facilitate tourism product development, planning and marketing with, cities, towns and federally recognized tribes with shared geographies to connect an exceptional collection of regionally identifiable visitor experiences.

Strategy for Regional Bike Trail Network, Facilities, Infrastructure, Amenities and Transport

The SCPRT should update its 2012 Regional Trail Planning and Management Guidelines for Snohomish County to assess additional needs, establish an inventory of future municipal plans, organize funding and identify stakeholders to direct the plan.

Strategy for Trails and Trail Town Development

The SCPRT should plan and support a collection of environmentally and fiscally sustainable trails (water, hiking, biking, equestrian and motorized) to promote the economic benefits of environmental awareness to the many partners committed to delivering an exemplary trail experience. The SCPRT should commit sustainable destination development efforts to define and connect districts, areas and communities with recreational amenities along these shared visitor routes and; to identify the areas as “towns of the trail” or “trailhead towns/ trailhead hubs” as appropriate.

Strategy for Visitor Capacity Planning / Traffic / Transportation

The SCPRT should join forces with the County Department of Public Works, the Puget Sound Regional Council (PSRC), the Washington State Department of Transportation (WSDOT), US Department of Transportation and other highway, roads and transportation related organizations and agencies to advocate for a Visitor Transportation Strategy that identifies issues and opportunities for improving visitor-related transportation in Snohomish County.

The SCPRT should engage with U.S. Forest Service and other county, state and federal officials as they research and study possible improvements along Mountain Loop Highway.

Strategy for Mobile Connectivity and Open Data

The SCPRT should work with the county Department of Information Technology Systems (DIS) to advocate for internet and wireless service providers to install fiber in rural areas of Snohomish County that are frequented by high numbers of visitors or where tourism operators are located, yet do not have existing or adequate internet or cell phone coverage and create strategies and plans to provide coverage. The SCPRT and SCTB should engage with technology providers to determine how big data and mobile hot spots can be used to determine and track user capacities, patterns and habits of recreational use.

Strategy for Visitor Wayfinding

The county should continue to work with regional partners, federal, state, county and local officials to establish and implement consistent, coordinated and effective wayfinding systems (physical and online) that make it easier for visitors to find their way around Snohomish County and to / from their specific visitor destinations.

Strategy for Lodging and Facility Options

The county should organize research and analysis to provide empirical evidence necessary to properly frame the situation regarding luxury / upscale / high-end lodging in urban areas as well as boutique and alternative lodging options in rural and remote areas. The SCPRT with support from the SCTB should consider meeting and convention space needs in conjunction with lodging and develop a Snohomish County Lodging Strategy, if necessary, to address the situation.

Strategy for Aviation District and Commercial Air Service

The county should promote and celebrate the very successful Boeing Tour, and promote the presence of the additional aviation and military history experiences at the Paine Field Airport, and around the county. The county also has the new opportunity to expand promotion of the Paine Field Airport as an important front line, introduction of new visitors coming to Snohomish County.

Strategy for Events & Festivals

The county should work with regional LTACs to create an arts, cultural and sports events and festivals strategy to set forth the vision, goals, strategy and plans for creating, incubating and facilitating visitor-related events and festivals that increase economic contribution from visitors.

Strategy for Seasonality

The county will increase the priority, consideration and funding given to off-season tourism marketing, promotions and communications, group meetings and sporting event sales efforts, destination product development activities, events, festivals; and other co-produced visitor activities that extend stays and help reduce seasonality issues.

Strategy for Infrastructure Investment / Gaps

The SCPRT should identify tourism infrastructure gaps, and work with stakeholders to agree on a prioritized portfolio of proposals for presentation and advocacy to city, county, state, federal and local agencies.

Implementation Framework, Protocol and Funding

The update of the Strategic Tourism Plan provides an opportunity for the county to not only update the strategies, plans and performance measures, but also to update the framework, protocol and funding for Snohomish County tourism.

Strategy for Organizational Capacity and Alignment

The SCTB and SCPRT should perform a full organizational assessment to identify, align and cross-connect resources for staff, leadership, development, industry education, advocacy, planning and travel marketing to help reduce redundant efforts and streamline service delivery.

Strategy for Snohomish County Department of Parks, Recreation and Tourism (SCPRT)

The SCPRT should draw together resources from a host of sources for expertise and funding essential for environmentally and fiscally sustainable tourism programs. Coordinated engagement should produce benefits to all sectors, communities and stakeholders and can be measured by the ability to:

- Effectively implement the new Strategic Tourism Plan with the SCTB.
- Implement regional initiatives to integrate tourism experiences, increase local participation in sustainable tourism planning to balance spending, length of visitor stay and repeat visits year-round.
- Increase the quality, focus and delivery of tourism marketing to meet changing demographics.
- Refine and capitalize on partnerships that support long-term tourism initiatives and environmental considerations.
- Pursue projects of merit that greatly influence visitor perception of Snohomish County as a leading outdoors adventure and recreation destination supported by local communities.
- Leverage outside investments and partnered resources to offset costs of increased recreational use. Increase stewardship engagement around place-based activities to increase environmental awareness of emerging projects.
- Develop and expand public-private opportunities to help local businesses provide amenities visitors require.
- Engage local communities in sustainable tourism planning through facilitation, education and regional corridor creation.

Strategy for Snohomish County Tourism Bureau (SCTB)

Snohomish County should contract (3-5 year) and fully fund the SCTB to deliver the full set of destination marketing and promotion activities set forth in this Strategic Tourism Plan.

Strategy for Lodging Tax Advisory Committee (LTAC)

The county LTAC should commit its mission to the implementation of the Snohomish County Strategic Tourism Plan and establish a strategy applying the undesignated fund balance to furthering Strategic Tourism Plan activities.

Designated Funds in Small and Large Fund monies may include:

- Acquisition, construction, improvement, or operation of convention center facilities, stadium facilities, or performance and/or visual arts center facilities, or payment of general obligation or revenue bonds used for these purposes;
- Advertising, publicizing, or distributing information for the purpose of attracting visitors and encouraging tourist expansion; and
- Maintaining required fund reserves established by the county LTAC.

Strategy for Tourism Promotion Area (TPA) Board

The TPA Board should commit its mission to the implementation of the Snohomish County Strategic Tourism Plan. The TPA Board should also establish a strategy applying the undesignated fund balance to furthering Strategic Tourism Plan activities and fully fund the Snohomish County Sports Commission.

Strategy for Lodging Tax Program / Projects Funding

Snohomish County should examine and assist in coordinating the broad collection of LTACs to better understand and address the shared priorities between communities, their regions and the county.

Strategy for Annual Action Plans

The 2018-2022 Strategic Tourism Plan should provide strategic recommendations for Snohomish County officials and agencies to guide tourism in the county over the next five years, while allowing each of the major organizations (County Executive; County Council; SCPRT; and SCTB) the flexibility to create and implement annual operating plans based on performance-to-date, available resources and changing conditions.

Making it Work

By now it should be clear that there are a lot of moving parts associated with developing, marketing and promotion of tourism in Snohomish County. So, to make the effort more transparent and manageable, the Strategic Tourism Plan has introduced a series of checkpoints that will help guide the planning and implementation.

For the Snohomish County Tourism Bureau (SCTB), they will start each year by hosting a Tourism Marketing Research Forum, to share and collect the latest tourism marketing research with and from stakeholders from around the county. This research plus the SCTB's annual report from the previous year will be used to create an Annual Tourism Marketing Plan that details the projects, programs, resources and funding that will be deployed for the coming year to implement its destination marketing and promotion responsibilities from the Strategic Tourism Plan.

At the same time, the Snohomish County Department of Parks, Recreation and Tourism (SCPRT) will produce its annual operating plan to detail its projects, programs, resources and funding that will be deployed for the coming year to implement its sustainable destination planning and product development responsibilities from the Strategic Tourism Plan.

These two plans will serve to translate the longer-term Strategic Tourism Plan into annual activities that fulfill the five-year vision and goals.

Harmonized Funding

There are three major sources of funds in Snohomish County that impact the activities, programs and efforts that are undertaken to benefit this single tourism industry, each regulated, managed and administered by individual legislation, boards and agents, and which in total collect more than \$6.5 million in county and local revenues each year.

In all cases, there are important reserves not yet allocated to tourism activities, and for two funds, no strategy for appropriate reserve levels or allocation of reserve funding.

Although the Strategic Tourism Plan is not in a position to re-engineer the legislation, structure or management of these funds, it does make several recommendations to harmonize individual funds so they can be put to better use to build and promote the industry they were designed to assist.

Beyond these fund-specific recommendations, the administrators for these tourism-generated and tourism-dedicated funds should also commit their missions and harmonized funding to the implementation of the Snohomish County Strategic Tourism Plan.

Performance Goals

The Performance Goals for the 2010 Strategic Tourism Plan included:

- I. Stronger Tourism Brand and Marketing Strategy
- II. Anchor Clusters and Anchor Attractions Focus with Strong Cross-Promotional Efforts
- III. Rich Network of Sustaining Clusters and Sustaining Assets
- IV. Stronger County Tourism Infrastructure
- V. Enhanced Organizational Capacity
- VI. Tourism Funding Resources Align with Strategic Goals

Although the performance goals set forth in the 2010 STP are all admirable, it was actually very difficult if not impossible to judge or know if or when these goals had been achieved. As a result, the performance goals for the update of the Strategic Tourism Plan that follow are a little more tangible and concrete, so at the end of the day, Snohomish County tourism stakeholders should be able to look at the results and instantly know if the goals for this update have been met.

Minimal performance goals for the 2018-2022 Strategic Tourism Plan include, but are not limited to:

- I. Grow visitor expenditures in Snohomish County as reported by Dean Runyan and Associates at the rate of inflation plus 2% annually.
- II. Increase the number of attendees, overnights and spending associated with group meetings and sporting events hosted in Snohomish County by 2% annually.
- III. Increase average events booked for the off-season months of October - April by 2% annually.
- IV. Increase and then maintain funding for Snohomish County Tourism Bureau at a level that is competitive with similarly sized Washington State destinations such as Spokane, Tacoma and Tri-Cities.
 - a. Fully staff the SCTB with full-time destination marketing professionals to oversee and implement the marketing, advertising, social media and media relations.
 - b. Fully staff the SCTB with a full-time brand and stakeholder relations team to implement the regional branding initiatives, community outreach, collateral development and integration with online and print promotional packaging.
- V. Increase the value of earned media by 5% annually.
- VI. Increase website traffic and social media engagement by 2% annually.
- VII. Increase VIC traffic by 2% annually at mobile and brick-and-mortar locations.
- VIII. Increase tourism business social media presence and engagement throughout the county by 10% annually as measured by the number of (4 or 5 star) TripAdvisor and Yelp reviews.
- IX. Increase stakeholder awareness and sentiment regarding Snohomish County's tourism contribution and impact as measured by an annual survey.
- X. Fully staff and deploy a sustainable destination development office under Department of Parks, Recreation and Tourism (SCPRT) to manage and organize Snohomish County sustainable destination development efforts.

Assumptions / Caveats

Please note, as with all forward looking plans, the performance goals set out for the Strategic Tourism Plan are based on a future that looks very much like it does the day this report was completed. However, any number of macro-economic, socio and political events that are out of the control of Washington State or Snohomish County officials and agencies, may impact the realization of these goals including, but not limited to:

- Changes to International visitor arrival traffic associated with international border policies issued by the Federal Government
- International visitor spending associated with changes to the currency exchange rate (e.g. US\$ vs. Can\$)
- The openings of new hotels and resorts, which will increase the room, supply and have downward pressure on occupancy, ADR and RevPAR
- Natural and manmade disasters
- Terrorist activities and threats
- Crime and negative publicity

Strategic Tourism Plan

The Strategic Tourism Plan that follows is oriented around two major areas of work and responsibility: Destination Marketing, Promotion, Visitors Services, and Sustainable Destination and Product Development.

The first focuses on the strategies, plans and performance measures associated with building tourism demand through efficient and effective marketing in all its guises led by the Snohomish County Tourism Bureau (SCTB).

The second focuses on the strategies, plans and performance measures associated with building a quality tourism experience (supply) through a focus on infrastructure, product and operations of the destination led by the Snohomish County Department of Parks, Recreation and Tourism (SCPRT).

Finally, the Strategic Tourism Plan touches on some important organizational and leadership issues that will have a major impact on the overall success of the update, trying to provide guidance and cohesion for a number of stakeholder groups and to break down silos that limit the industry's potential impact.

1. Destination Marketing and Promotion

The following Strategies, Plans and Performance Measurements are associated with Destination Marketing and Promotion. Although most of these activities are to be carried out by the Snohomish County Tourism Bureau (SCTB), there are some oversight responsibilities to be carried out by the SCTB Board of Directors, as well as the County Lodging Tax Advisory Committee (LTAC), the County Executive and the Snohomish County Department of Parks, Recreation and Tourism (SCPRT).

- 1.1 Marketing, Promotion and Advertising
- 1.2 Branding
- 1.3 Tourism Research
- 1.4 Website and Social Media Engagement
- 1.5 Public Relations and Communications
- 1.6 Meetings, Conventions and Groups Marketing and Sales
- 1.7 Sporting Events Marketing and Sales
- 1.8 Visitor Services
- 1.9 Collateral Materials
- 1.10 State-wide Cooperation
- 1.11 Industry Education

1.1 Marketing, Promotion and Advertising

Rationale:

Tourism is economic development. Successful economic development is typically defined as bringing new money into a region. Tourism does just that, injecting dollars from outside the region into the local economy. These new dollars create direct, indirect, and induced economic impacts that ripple through the economy.

Investments in tourism may also generate additional benefits by enhancing quality of life for local residents, and by raising awareness of what the region has to offer. Individuals may come once to an area for leisure or business travel, only to return later in life to relocate a business, buy a second home, or retire. Such impacts are impossible to measure, but every tourism region has stories that demonstrate how this dynamic plays out.

Significant resources were invested to implement the 2010 Plan - approximately \$1.2 million was spent to implement the plan between 2011 and 2016 - and while it is natural to ask about the return on that investment, the complicated nature of the county's tourism market makes it impractical to analyze how the market would have performed had these expenditures not been made.

Snohomish County tourism is affected by significant exposure to exogenous economic effects such as the health of the Canadian or Chinese economy. Moreover, Snohomish is a large county, with rural and urban assets, drawing a diverse set of travelers. This diversity is strength, but also means it is a fragmented and complex system with many interrelated factors, making it difficult to isolate the impact from individual investments.

Given these complications and the impossibility of conducting a robust return on investment study within the context of this planning process, it is helpful to review what is known about investments in tourism generally. A paper by Oxford Economics [1] explains why destination-level marketing is effective and why pooling resources to invest in a countywide tourism market makes sense. Larger-scale efforts overcome three marketing challenges that individual tourism and visitor attractions face:

- First, the report asserts that “the visitor economy is fragmented.” This means that “at the level of an individual business, the returns on independent marketing to attract visitors to a destination can be less compelling. However, when viewed at the level of the destination, there is a more direct connection. The destination captures a substantial dollar amount per visitor, and in aggregate there are compelling returns on effective destination marketing.”
- Second, “the primary motivator of a trip is usually the experience of a destination, extending beyond the offerings marketed by a single business.” Visitors typically do not travel based on the merits of an individual business or attraction, but based on the aggregate offerings of the region.
- Finally, “effective marketing requires scale to reach potential visitors across multiple markets.” This simply means that effective marketing can require the “significant and consistent funding” associated

with pooled regional efforts, rather than small-scale efforts by individual businesses that struggle to be heard above the noise of the marketplace of competing attractions.

[1] Destination Promotion: An Engine of Economic Development. Oxford Economics, November 2014.
<http://www.oxfordeconomics.com/engine>

Plans:

The Snohomish County Tourism Bureau (SCTB) will develop and implement an annual Tourism Marketing Plan detailing its investment, resources, activities, operations and timing associated with:

- Branding (details at 1.2)
- Tourism Research (details at 1.3)
- Website and Social Media Engagement (details at 1.4)
- Public Relations and Communications (details at 1.5)
- Meetings, Conventions and Groups Marketing and Sales (details at 1.6)
- Sporting Events Marketing and Sales (details at 1.7)
- Visitor Information Centers (details at 1.8)
- Collateral Materials (details at 1.9)
- State-wide Cooperation (details at 1.10)
- Professional Development (details at 1.11)

In regard to advertising activities, SCTB will provide a comparative business plan for advertising agency activities identifying the costs, benefits and expected results of in-house production vs. outside vendor delivery for a portfolio of services including, but not limited to:

- Media planning and buying
- Creative services
- Radio and television production
- Internet marketing
- Website and Social Media Engagement
- Public Relations and Communications
- Collateral Materials

The comparative business plan will be presented to Snohomish County Department of Parks, Recreation and Tourism (SCPRT) for decision, after which SCTB will implement the preferred direction.

Also, please note that the decision associated with the business plan (in-house vs. vendor production) will have a significant impact on the organizational structure of the SCTB.

To orchestrate all these activities, the SCTB will develop and manage an annual Tourism Marketing Plan, which will be reviewed, considered and agreed by the SCTB Board of Directors and the SCPRT. Afterwards, the plan will be submitted to the County Lodging Tax Advisory Committee (LTAC) and the County Executive for funding.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Standard measures of Snohomish County tourism economic impact
2. Individual performance measures from each of the following strategies 1.2-1.11

1.2 Branding

Rationale:

The primary role of Snohomish County's Destination Marketing Organization (DMO) is to develop and deploy the destination brand and inspire consumers to visit the county.

During the Strategic Tourism Plan project, stakeholders and tourism leaders also suggested that there is a need to engage stakeholders about the existing brand concepts. One way to do this is for the Snohomish County Tourism Bureau (SCTB) and Snohomish County Parks, Recreation and Tourism (SCPRT) to engage stakeholders in the regions to develop and expand messaging that highlights and distinguishes their identities to target markets within an overarching brand.

Strategy:

Evaluate the existing brand to determine if "Open Up" resonates with target markets and key stakeholders to determine if the current brand can be expanded/refreshed or if development of a new brand is needed.

Plans:

The SCTB should continue to activate brand action ideas, not yet completed, that are contained in the Snohomish Brand Print Report (Pages 129-154) such as:

- Coalesce your reputation in the outdoor leisure market
- Create a public-private sector partnership
- Organize local products around the brand
- Work with the tourism industry businesses and regions to encourage engagement in regional brand and identity development
- Identify easiest consumer touch points and brand them
- Brand cost-effective, relevant signage
- Infiltrate your infrastructure
- Create a Mobile Visitors Center
- Evaluate the branding potential of new and existing events

Most importantly on this list, the SCTB should focus on building on the brand manager charged with introducing / re-introducing the brand throughout the county and exploring with stakeholders and partners to determine how it can be used in their efforts. The liaison would also serve as a resource, answering questions and providing requested brand-related materials. Paramount to this effort, the Brand Manager should coordinate the sub-branding efforts and integration of the regions' branding within the larger county tourism brand. The Brand Manager should focus on how the brand is mutually beneficial for all the players and give them specific ideas

for how they can integrate the brand message and identity into their own marketing and show them how it can be used by each regions assets and attractions.

Second, SCTB should focus on continuing to create a public-private sector partnership to marshal the power of the brand. Working in partnership with the SCPRT, the Brand Manager and the Brand Liaison should establish a Snohomish County marketing partnership with stakeholders throughout the regional work groups and coalitions including large and small hospitality industry businesses, organizations, museums, lodging, attractions, parks, outdoor recreation providers, media, and individuals. Engagement should foster cooperation and forward momentum on behalf of the entire county, reducing any existing conflicts.

This team approach (including the private and public sector) to managing the brand furthers the buy-in and adoption of the resulting work. It keeps in mind the big picture and it weathers changes in political administrations. Most importantly, this group can solicit funds for brand implementation from its stakeholders (typically the larger the organization, the greater the financial support). Ultimately, partnerships with private sector companies and organizations will be the primary funding source that drives the brand.

In addition to refocusing on completion of the action ideas contained in the brand print report, the following activities identified in the Brand Assessment conducted for this project should be undertaken to better position the brand for success in the future. If the Open Up brand is maintained the following work must be undertaken:

Refresh Open Up Brand Platform

- Refresh Open Up typeface, logo and graphic assets to be used in all marketing applications.
- Refine messaging and application of brand pillars and regional brands with clear positioning features that highlight the attractions of Snohomish County and the regions.
- Consider logo refresh and expansion with visual iconography.
- Refresh the brand style guide accordingly outlining brand colors, font choices, text treatments, iconography, image-use guidelines and quality control and tone of voice.

Refresh and Refine Brand Messaging

- Clarify naming and key messages for each brand pillar to be used consistently across brand applications of Snohomish County.

Refresh Open Up Digital and Design Assets Across Platforms

- Develop Immersive Short Films: Given the importance of digital marketing and emotive film, it is recommended that a digital film strategy be created to better portray the beauty, attractions and intriguing story of the region.
- Develop or Utilize Existing Alluring Photography Assets: New, original lifestyle photography, outdoor photography, event photography and anchor location photography for use across all relevant collateral.

Develop a new Interactive Website

- Expand Interactivity: We believe that the website has a far larger role to play than it does at the moment, and could easily be the portal for information for many stakeholder groups. We also

acknowledge that some visitors will not utilize a web based service, so we recommend centralization of available documentation through visitor bureaus airports partner venues etc.

- Consider expanded industry and media portal, conference and events portal, itinerary portal, etc. where information about workshops, product development programs and information can be stored.
- Expand travel and transportation pages to integrate interactive resources such as Roadtrippers.com, or interactive local transportation maps via Google maps to improve functionality.
- Develop second and third tier travel itinerary pages to be more easily accessible and searchable with immersive films, itineraries and images interactively embedded in the website.
- Improve User Experience: minimize page clicks to get to pertinent information, refresh design look, feel, usability, and navigation.

Develop International Visitor Content

- The Pacific Northwest is fast becoming a well frequented destination for international and Asian visitors. International visitors need access to translated website content, translators and dedicated international travel guides in their language of choice. Consider partnering with local international groups to co-produce visitor guides and digital content for key audiences in Japan, China, Korea, and European Countries. At minimum design refreshed website with multi-lingual options.

Create Multi-year Outdoor Adventure Campaigns

- Capitalize on targeted messaging and itineraries for the “Where Seattle gets outside and Seattle’s Backcountry (escapes, gets outdoors, where Seattle meets the outdoors, go out socially, go out shopping, get outside of yourself)” messaging.

Expand Consistent Social Media Campaign Strategy and Implementation: utilizing new digital assets or alluring photography and emotive films

- Content should be directed with brand standards on postings, photography and messaging.
- Social user generated content should be encouraged through competitions, partner promotions, hashtag campaigns and live event social media integration.

Simplify Copy Content and Language Across Platforms: making it simple and clear / aspirational yet reduce overall quantity of type content using active links, interactive digital tools such as maps, search functions etc.

Develop Digital Portal for Partners and Media: Centralize imagery, film and messaging resources and access through web based platform

- Groups & Conventions: Could be expanded with an interactive convention planner tool, destination marketing toolkit, and more image and film content to draw planners into the possibilities of hosting their event in Snohomish County.

Performance Measures and Assessment:

Success of this strategy will be measured by:

The Snohomish County Marketing Partnership, with assistance from the Brand Manager, Marketing Director, and other key marketing staff, and SCPRT Destination Development staff should undertake an annual review of progress against these activities to assess the status of work for completion or continuing engagement. The annual Brand Assessment Report will serve as input to the SCTB's Annual Marketing Plan.

1.3 Tourism Research

Rationale:

Individual tourism stakeholders (hotels, attractions, restaurants, retailers, etc.) in Snohomish County are generally unable to commit the resources (human and financial) necessary to commission, purchase, analyze and communicate tourism research and trends that may impact or inform the broader travel and tourism industry throughout the county. However, with that said, a number of stakeholders do collect marketing research specific to their own business(es) that they are willing to share and might assist the Snohomish County Tourism Bureau (SCTB) and other industry stakeholders to do their jobs.

Strategy:

The SCTB should collect, purchase, maintain and communicate basic and detailed tourism statistics, research and information (nationally, statewide and countywide) on a regular basis to monitor, identify opportunities / threats and educate / inform industry stakeholders on recent trends, current results and future business outlook. This information can be housed on the expanded Industry section of the new Website.

Plans:

Each year, at the beginning of the SCTB planning cycle, the SCTB will host a Snohomish County Tourism Marketing Research Forum, where:

SCTB presents and shares the latest tourism sector results and forecasts for tourism (nationally, in Washington State and in Snohomish County) including, but not limited to:

- Visitor counts and spending
- Accommodation results (occupancy, ADR, RevPar, seasonality)
- Visitor activities, events and festivals
- Group and sports event results and bookings
- Visitor perceptions and reviews
- Visitor market results and future forecasts
- Travel and tourism trends

Snohomish County Department of Parks, Recreation and Tourism (SCPRT) will present and share their latest expectations for new and future tourism-related infrastructure, developments, businesses, activities and events.

Selected stakeholders from each of the major industry sectors (hotels, attractions, restaurants, retail, outdoor recreation, convention centers, arts / culture) will also be asked to present their sector results and outlook for the upcoming planning year.

SCTB will compile and share this research and information each year on its website for all Snohomish County tourism stakeholders and use it internally to produce their annual Tourism Marketing Plan.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The hosting, attendance and information shared at the Snohomish County Tourism Marketing Research Forum.
2. The insights gained and consensus built amongst the County tourism stakeholders.
3. Research input into the annual Tourism Marketing Plan.

1.4 Website and Social Media Engagement

Rationale:

Digital communication is one of the most important channels available for marketing, selling and promoting a tourism destination and its tourism products / services, with user-generated content holding an even stronger position in travel and tourism marketing with virtual word-of-mouth replacing more and more traditional tourism marketing activities. Additionally, social media is rapidly and increasingly impacting the way visitors gather information, plan their visits and engage with the destination during their visits.

Strategy:

The Snohomish County Tourism Bureau (SCTB) should continue to build and enhance its digital marketing, promotions and communications resources and delivery by investing in in-house technology, personnel and activities that are leading edge or by commissioning and managing an outside vendor(s) that can deliver a customized solution that achieves the county's digital goals and objectives.

Plans:

The SCTB will produce a comparative business plan for digital marketing, promotions and communications identifying the costs, benefits and expected results of in-house production vs. outside vendor delivery for a portfolio of services including, but not limited to:

- Continuing website hosting, regular design enhancement and maintenance.
- Continuing content development (photography, videography, text, etc.)
- Increased efforts to connect Snohomish.org and the Open Up brand with regional, local and city/town DMOs, Chambers and other organizations.
- Increased efforts to collect, share and facilitate website content such as postings and calendars with stakeholders.
- Regular content creation, daily engagement and facilitation on all major social media platforms such as Facebook, Twitter, Pinterest, YouTube, Instagram and LinkedIn.
- Digital performance reporting.

The comparative business plan will be presented to Snohomish County Department of Parks, Recreation and Tourism (SCPRT) for decision, after which SCTB will implement the preferred direction.

Please note, this comparative business plan for digital marketing, promotions and communications may be produced separately or combined with the comparative business plans suggested for:

- Marketing, Promotion and Advertising (details at 1.1)
- Public Relations and Communications (details at 1.5)

- Collateral Materials (details at 1.9)

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Delivery of the comparative analysis and digital business plan followed by implementation.
2. Standard website performance indicators such as uptime, page speed, full page load time, error messages, database performance, website visitors, broken links and website quality.
3. Standard measures of marketing effectiveness including unique visitors, page views, search engine traffic, bounce rate, conversion rate and inbound links.
4. Social media measures such as:
 - a. Awareness, using metrics like volume, reach, exposure and amplification.
 - b. Engagement, using metrics around retweets, comments, replies, and participants.
 - c. Driving traffic to the website, using URL shares, clicks and conversions.
 - d. Advocates and fans, using contributors and influence.
 - e. Share of voice, using volume relative to your closest competitors.
5. Local tourism business presence and engagement as measured by Yelp and Trip Advisor.

1.5 Public Relations and Communications

Rationale:

The 24/7 nature of today's news requires that destination marketing organizations like Snohomish County Tourism Bureau (SCTB) constantly manage the county's brand and public image to make sure it is always presented and delivered by public relations professionals in a positive light that will speak to existing and potential visitors.

Strategy:

The SCTB should continue to expand its use of Public Relations and Communications tools to position Snohomish County as a desirable travel destination by:

- Working with identified travel writers and travel publications to gain local, regional and national exposure through targeted public relations efforts.
- Increasing awareness of Snohomish County as a primary visitor destination; increasing visitation; promoting soft adventure and outdoor recreational opportunities; supporting facility, community and attraction developments with support of press releases and inclusion in media newsletters and via social media platforms.
- Developing and implementing a strategic media relations program including electronic press kits, database of local, regional and national media and bloggers; establishing relationships with freelance writers; and conducting media familiarity (FAM) tours.

Plans:

The SCTB will produce a comparative business plan for public relations and communications identifying the costs, benefits and expected results of in-house delivery vs. outside vendor delivery for a portfolio of services including, but not limited to:

- Conducting media outreach and training representing the Snohomish County brand.
- Planning and executing media days to introduce Snohomish County to targeted writers, editors, influencers and bloggers.
- Organizing organic and paid influencer programming.
- Developing content plans across paid, earned and owned channels.
- Producing dynamic and engaging editorial and digital design material including videos, print and online articles for use across multiple platforms.
- Engaging writers, editors, photographers and video production specialists.
- Organizing and executing press and FAM trips.
- Delivering real-time crisis management to help protect, repair and promote the Snohomish County brand and reputation.

The comparative business plan will be presented to Snohomish County Department of Parks, Recreation and Tourism (SCPRT) for decision, after which SCTB will implement the preferred direction.

Please note, this comparative business plan for public relations and communications may be produced separately or combined with the comparative business plans suggested for:

- Marketing, Promotion and Advertising (details at 1.1)
- Website and Social Media Engagement (details at 1.4)
- Collateral Materials (details at 1.9)

Performance Measures and Assessment:

Success of this strategy could be measured by PR monitoring services covering:

1. Broadcast TV & Radio
2. Media Coverage
3. Social Media Mentions, Shares and Likes
4. Google Alerts / Netvibes
5. Blogger Evaluation services
6. Google Analytics

1.6 Meetings, Conventions and Groups Marketing and Sales

Rationale:

Meetings, conventions and group travelers are a significant portion of Snohomish County tourism now, and they represent a large potential market opportunity. Visitors attending multiple-day events are likely to overnight in Snohomish County and may be encouraged to broaden and extend their stay, providing additional business to the county's many tourism assets and services.

Strategy:

The Meetings, Groups & Packaged Travel Sales Department of the Snohomish County Tourism Bureau (SCTB), should continue to establish and develop Snohomish County as a premier destination (regional, state, national and international) for convention, event and groups by providing targeted sales efforts, quality servicing of event organizers and their events, and delivery of high quality travel and tourism products and services. The staff should participate as much as possible with the destination product development team to align efforts and recruitment with prioritized needs of communities.

Plans:

Snohomish County will competitively fund and staff the Meetings, Groups & Packaged Travel Sales Department of the SCTB.

The Meetings, Groups & Packaged Travel Sales staff will advocate for and facilitate the addition of meetings and group venues to accommodate interested group, as well as market, promote and actively work with meeting venues and local event organizers to increase group- related business in Snohomish County.

The Meetings, Groups & Packaged Travel Sales staff will enhance the meeting facility guide, related materials and online presence to promote the organized group market in the area.

The Meetings, Groups & Packaged Travel Sales staff will identify and prioritize meetings and event opportunities that assist with Snohomish County seasonality issues, focusing on events scheduled for October - April.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The economic impact associated with definite meetings and group events achieved by the SCTB sales department.



2. The number of meetings and group events scheduled for October through April (shoulder and off season).

1.7 Sporting Events Marketing and Sales

Rationale:

Sporting event travelers (competitors, spectators and their friends / families) are a significant portion of Snohomish County tourism now, and they represent a growing market opportunity. Visitors attending multiple-day sporting events are likely to overnight in Snohomish County and may be encouraged to broaden and extend their stay, providing additional business to the county's many tourism assets and services.

Strategy:

The Snohomish County Sports Commission, the sports sales department of the Snohomish County Tourism Bureau (SCTB), should continue to establish and develop Snohomish County as a premier destination (regional, state, national and international) for amateur, collegiate and professional sports events and tournaments by providing targeted sales efforts, quality servicing of event organizers and their events, and delivery of high quality travel and tourism products and services.

Plans:

Snohomish County will fully fund and staff the sports department of the SCTB, branded as the Snohomish County Sports Commission, through the Tourism Promotion Area (TPA) application process and the county large lodging tax fund (LTAC) as part of the Tourism Bureau's contract. A multiple year contract and secure funding are recommended as noted previously.

The Snohomish County Sports Commission will advocate for and facilitate the addition of sports venues to accommodate amateur athletics, as well as market, promote and actively work with sports venues and local event organizers to increase sports- related business in Snohomish County.

The Snohomish County Sports Commission will enhance the sports facility guide, related materials and online presence to promote the organized sports market in the area.

The Snohomish County Sports Commission will work to identify and prioritize sports event opportunities that assist with Snohomish County seasonality issues, focusing on events scheduled for October - April.

The Snohomish County Sports Commission will work with SCPRT to identify and explore and prioritize sports events that connect with Snohomish County's strengths in trails, outdoor recreation, biking and equestrian.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The economic impact associated with definite sports events achieved by the sports department of the SCTB, branded as the SCSC
2. The number of sports events scheduled for October through April.
3. The number of sports events associated with trails, outdoor recreation, biking and equestrian as code and venue capacity allows.

1.8 Visitor Services

Rationale:

The utilization of Visitor Information Centers is changing rapidly as visitors transition from traditional brick and mortar access to destination information sources (printed materials and person-to-person guidance) to online sources such as the DMO website/mobile site, TripAdvisor, Yelp, OpenTable, etc. With that said, there may still be a need for staffed and unstaffed Visitor Information Centers in regular and special event high-traffic locations to serve a walk-in / drive-in audience.

Strategy:

Snohomish County will seek to balance physical visitor information centers (permanent, mobile and special event) and their associated staffing, volunteers, leveraged partnerships and hard copy requirements with the developing trend toward greater online and mobile phone technologies, applications and delivery of visitor information.

Plans:

1. The Snohomish County Tourism Bureau (SCTB) will continue to work with visitor establishments to help them establish and maintain their presence on the major visitor and tourism-related information sources such as TripAdvisor, Yelp, OpenTable, Kayak, Google Maps, Facebook, Twitter, Instagram, etc. as well as SCTB visitor guides, websites and social media.
2. The SCTB will continue to develop and enhance its online (website and mobile), social media (Facebook, Twitter, Instagram, etc.) and offline (visitor guides) presence to present the full range of visitor establishments and activities to visitors as they plan and undertake their visit to Snohomish County.
3. The SCPRT and SCTB will evaluate opportunities for the three Visitor Information Centers located in the cities of Snohomish, Lynnwood and Future of Flight in Mukilteo, and consider their potential for collaborating with other organizations providing visitor services and information such as chambers of commerce, downtown associations and various front-line staff while delivering mobile visitor information services to high-traffic visitor locations and events.
4. The SCTB will continue to communicate with potential and existing visitors (thru signage, kiosks, email, messages, social media, etc.) to direct them to online and mobile sources of information.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The number and intensity of Snohomish County visitor establishments engaged on major visitor tourism-related information sources and social media.

2. The number of online and hardcopy visitor guides and materials delivered in person and electronically to potential and existing visitors.
3. The number of visitors served by the three VICs and mobile VICs.
4. The number of online and mobile users connecting to the SCTB websites, social media and apps.

1.9 Collateral Materials

Rationale:

Potential and existing visitors continue to engage with destinations around the world through their printed, electronic and mobile marketing collateral including, but not limited to visitor guides, maps, itineraries, etc.

Strategy:

The Snohomish County Tourism Bureau (SCTB) should continue to produce a series of visitor guides, maps, itineraries and other marketing collateral to inspire and guide existing and potential visitors to Snohomish County.

Plans:

The SCTB will produce a comparative business plan for creative services; print, digital and mobile production services identifying the costs, benefits and expected results of in-house delivery vs. outside vendor delivery for a portfolio of collateral materials including, but not limited to:

- Visitor Guides
- Maps
- Itineraries
- Etc.

The comparative business plan will be presented to Snohomish County Department of Parks, Recreation and Tourism (SCPRT) for decision, after which SCTB will implement the preferred direction.

Please note, this comparative business plan for creative services; print, digital and mobile production services may be produced separately or combined with the comparative business plans suggested for:

- Marketing, Promotion and Advertising (details at 1.1)
- Website and Social Media Engagement (details at 1.4)
- Public Relations and Communications (details at 1.5)

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The number of online and hardcopy visitor guides and materials delivered in person and downloaded to potential and existing visitors.

1.10 State-wide Cooperation

Rationale:

The Snohomish County Tourism Bureau (SCTB) will continue to create cooperative state-wide marketing and promotional programs with the Greater Seattle Area tourism bureaus based on the fact that 60% of visitors to Snohomish County also visit Seattle.

Strategy:

The SCTB should create and maintain strong working relationships with state-wide partners including but not limited to Visit Seattle, Visit Bellevue Washington, Explore Kirkland, Explore Bothell and Visit Woodinville to explore and create cooperative marketing programs for visitors seeking a range of experiences beyond county or city limits.

Plans:

The SCTB will work with state-wide DMOs to create, market and promote state-wide itineraries, featured events and festivals, key attractions and other state-wide visitor opportunities and experiences that connect Snohomish County and its visitors with neighboring destinations. In return, SCTB will work to include Snohomish County attractions, events and festivals and itineraries in the marketing and promotional materials produced by neighboring destinations.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Number of collaborations on state-wide itineraries for packaged travel and media.

1.11 Industry Education

Rationale:

The vast majority of travel and tourism operators, businesses and establishments in Snohomish County are small and medium-sized enterprises (SMEs) with limited budgets, which do not have the resources or time to build their in-house marketing and promotional expertise or efforts to reach the target audiences they seek. The same can be said for a number of local Destination Management Organizations (DMOs) in city, town and community agencies tasked with marketing and promoting their destinations. Also, both groups may not have the experience to create their own online presence, website and social media engagement or take advantage of the many free or low cost avenues available for travel and tourism businesses and destinations to increase their visibility and reach to a global audience.

Secondly, these same SMEs with limited and sometimes part-time, seasonal, and/or inexperienced personnel are responsible for delivering face-to-face customer service to thousands of very important Snohomish County visitors, which have been promised a quality experience

Strategy:

The Snohomish County Tourism Bureau (SCTB) will continue to organize, facilitate and deliver professional development services associated with travel and tourism marketing and promotion, PR and communications and digital / social media engagement as well as quality customer services to county-based travel and tourism operators, government agencies and organizations.

Plans:

The SCTB will organize, facilitate and deliver an annual schedule of periodic professional development services and capacity-building for local public and private industry stakeholders to help them increase their experience and expertise associated with travel and tourism marketing and promotion, PR and communications, online presence and social media engagement. The Bureau will also deliver basic customer services training and “It’s Local” training for employees and service workers who may interact with visitors.

The SCTB should also create and launch a public service campaign to educate and inform Snohomish County residents about the importance of travel and tourism to the county and how they can contribute to a positive visitor experience.

Performance Measures and Assessment:

Success of this strategy will be measured by:



1. The number and regularity of professional development / capacity building events and distribution of such events throughout the county.
 2. The creation and launch of a public service campaign for Snohomish County stakeholders.

2. Sustainable Destination and Product Development

The following Strategies, Plans and Performance Measurements are associated with Sustainable Destination Management including, but not limited to destination and product development. In general, these activities are to be carried out by the Snohomish County Department of Parks, Recreation and Tourism (SCPRT) in cooperation with Snohomish County Tourism Bureau (SCTB), federally recognized tribes, recreation and non-profit organizations, scientific and academic communities, county and local officials, departments and agencies, local communities and industry stakeholders countywide.

- 2.1 Regional Sustainable Destination Product Development, Marketing and Promotion
- 2.2 Regional Bike Trail Network, Facilities, Infrastructure, Amenities and Transport
- 2.3 Trails and Trail Town Development
- 2.4 Visitor Capacity Planning / Traffic / Transportation
- 2.5 Mobile Connectivity and Open Data
- 2.6 Visitor Wayfinding
- 2.7 Lodging and Facility Options
- 2.8 Aviation District and Commercial Air Service
- 2.9 Events & Festivals
- 2.10 Seasonality
- 2.11 Infrastructure Investments/Gaps

2.1 Sustainable Regional Destination Product Development, Marketing and Promotion

Rationale:

Smaller than a state yet larger than a city, Snohomish County is spread over a vast 2,196 square miles. With 19 cities and towns spread along the coastline, scattered across rich agricultural land or offering edgy urban streetscapes, the sheer size and scale of the county is difficult for visitors and even the tourism industry itself to comprehend.

The 2010 Plan set out to strengthen and coordinate the county's many tourism assets around the big idea, to focus visitor attention towards anchor clusters and attractions while working to enhance and extend the visitor experience with sustaining clusters and assets.

The 2010 Plan approach suggested the creation of four Tourism Exploration Zones (TEZ) to organize the county into North, South, East, West and Central sections to develop itineraries and promote attractions and assets located in each zone.

The approach would help visitors plan their exploration between anchor attractions and sustaining clusters within a zone. The idea had merit but fell short in that:

- Visitors aren't interested in visiting zones. They want to experience places and activities.
- The TEZs were still too large, the boundaries did not reflect existing and iconic regions in the county that follow coastlines, river valleys and urban areas where both anchor assets and sustaining clusters are located
- The TEZ approach didn't address the need for local supply side investment or coordination to support target markets with packaged experiences, so the concept never moved beyond a "do it yourself, connect the dots" exercise.

This 2018-2022 Strategic Tourism Plan re-imagines this approach in several ways. First, it addresses both the need to make the county landscape more engaging and accessible to visitors. Second, many regions of the county are already attempting to organize their offerings, but lack an organizational framework to connect the dots between their product development, marketing and promotions and that of their regional partners.

Enhanced capacity and realigned resources between the Snohomish County Tourism Bureau (SCTB) and Snohomish County Parks, Recreation and Tourism Department (SCPRT) will allow the organizations to serve the industry together in new ways. Through a re-imagined regional approach, the organizations can enhance and facilitate development and promotional efforts already underway by cities, towns and communities by helping the regions organize offerings around their shared experiences for greater appeal to target markets.

Strategy:

The SCPRT with support from the SCTB should organize, coordinate and facilitate visitor region-specific sustainable destination planning and product development. This will include sub-regional identity / brand development and marketing efforts to complement and express regional identities in SCTB marketing and promotions efforts.

Staff, regional councils and work groups representing federally recognized tribes, communities and partners will draw from existing and projected development priorities and make plans to address and implement the initiatives of the 2018-2022 STP for their region. Evaluation and planning will consider the shared characteristics, cultures, landscapes, districts and trails, visitor capacities, infrastructure and other needs of each region, per the STP.

Facilitated regional development will include structured workshops, specialized think tanks, assessments and benchmarks and will culminate in a structured programming framework the County can use beyond the life of the current STP. Regional councils and work groups will collaborate on a variety of topics that address sustainable tourism planning and product development, marketing and promotions for each region and establish short, mid-range and long-term actions to implement the STP. Outcomes of this work will determine how shared challenges, opportunities, brand identities, resources and funding can best align to address overall implementation of the 2018-2022 Strategic Tourism Plan within each region.

Conceptual visitor regions to explore as the basis of this framework may be, but are not limited to:

- The Port Susan and Seven Lakes Region
- The Stillaguamish-Sauk River Valleys
- The Mountain Loop Highway
- The Skykomish-Snohomish River Valleys
- The Urban Hub Corridor
- The Coastal Communities of the Salish Sea

The process will engage stakeholders and communities with regional visioning, planning and development facilitation to identify and organize resources around the greatest shared priorities and challenges in their region and inform the county about how these issues can be jointly addressed.

Likewise, the SCPRT and SCTB will engage with stakeholders in the process to explore connections between anchor attractions and how these assets function as part of their regional differentiation. With goals of regional distinction, stakeholders should consider how large and small attractions interact with each other and how new connections between entities can create supply chains, tours, packages and itineraries for product development that the SCTB can market and promote on behalf of each region to further differentiate it. Major attractions identified in the STP include:

- Aviation District and Commercial Air Service

- Sports
- Outdoor Recreation and Adventure
- Tribal Gaming
- Shopping
- Business and Events Based Travel

Special attention will be paid to linking region-specific experiences and routes with co-located attraction anchors for product development, to expand exploration and identify each region to visitors. Associating smaller regional assets like breweries, arts, water, land and farm trail experiences, and culinary excursions with major attractions, the SCTB can support regional priorities by marketing connected regional experiences designed to build affinities for, and connections to, local products and culture, to further differentiate the region.

- Winery, Distillery and Brewery Trails
- Indigenous Culture, History and Art Experiences
- Agriculture and Culinary Experiences
- Mountain Biking / Trail and Road Biking
- Land and Water Based Trails with Towns of the Trails
- Arts/ Culture/ Heritage Festivals, Events and Activities
- Unique Visitor District Experiences

A wide variety of grass-roots efforts are needed by regional partners to collectively shape their sustainable destination planning and product development, destination marketing and promotions. With facilitation and newly developed regional planning frameworks, each region should approach this work collaboratively and consider how product development and destination marketing work together to influence quality of life and visitor perceptions for their region. Establishing regional work groups to weigh in on and advocate for the needs of their region will be essential to the success of this sustainable regional destination development planning, marketing and promotions work and are an essential tool to keep the process moving forward.

Plans:

The SCPRT with support from the SCTB will facilitate a phased, regional engagement process with businesses, organizations, federally recognized tribes, cities, towns and communities to begin regional development work groups.

Facilitation will explore regional perceptions and appetites for tourism, areas of concern, conceptual regional boundaries, names, and determine collective visions within each region. Facilitated regional work groups will identify, inventory and prioritize the unique characteristics to develop and promote that best differentiate their region. Regional work groups will evaluate opportunities, challenges and ways to connect, enhance and align existing and future sustainable destination development planning and product development efforts to highlight these differentiating characteristics.

The SCPRT and SCTB will facilitate planning to establish with the regional work groups immediate, intermediate and long-range development and marketing priorities to aid in implementation of the strategies of the STP. These priorities for development will be used to inform other applicable strategies of the STP, including infrastructure gaps, capacities, trails and community planning needs outlined in the plan.

The SCTB will work to understand existing regional marketing and promotional opportunities, partnered resources, collateral materials, digital assets, PR and communications. Based on these engagements the SCTB will seek to coalesce funding of partnered resources and develop regional promotions, visitor campaign(s) and packages locally, countywide and beyond.

The SCTB will continue to create and deliver co-op advertising with promotion programs and campaigns that reinforce the individual and differentiated offerings of the regions to extend the reach of individual stakeholders to a broader audience of targeted potential visitors.

The SCTB will provide capacity building efforts, especially focused on digital development and social media outreach to local stakeholders to help reinforce these regional identities and established priorities for promotion.

The SCPRT will develop programming around this work to organize ways the industry and community stakeholders can continue to coordinate funding alignments, technical assistance for project planning and grant requests that reflect regional connectivity, identity and off-season activities.

Performance Measures:

Success of this strategy will be measured by:

1. The number of individual stakeholders, businesses, cities, towns and communities that have engaged with the SCTB and SCPRT to join in cooperative development, marketing and promotional activities.
2. Regions, regional councils, work groups and action plans established.
3. Regional planning framework established to support product development, coordination of grant funding to address off-season business and other issues detailed in the 2018-2022 STP.

2.2 Regional Bike Trail Network, Facilities, Infrastructure, Amenities and Transport

Rationale:

According to Washington Bikes:

A recent study, Economic Analysis of Outdoor Recreation in Washington State, commissioned by Governor Inslee's Task Force on Parks and Outdoor Recreation illustrates the significant economic impact of bicycling in Washington State. Among the findings are these facts:

- Bicycle riding is #3 in recreational activities by total expenditures in Washington State with over \$3.1 billion spent statewide.
- Bicycle riding comes in as the fourth biggest recreational activity by total number of participant days in Washington State.
- Unlike many activities where equipment rentals and purchases make up the majority of their economic impact, bicycle riders' trip-related expenditures account for 96% of the economic impact of bicycling. Bicyclists contribute more per capita to local businesses via shopping, lodgings, and eating than other types of recreational tourists.

By detailing Snohomish County plans for regional bike facilities, infrastructure, amenities and transport, there may be an opportunity to significantly increase biking related visits with special attention to iconic trails like the Centennial Trail, Interurban Trail, Whitehorse Trail and their feeders. These trails, and potential network connections, have the potential to transport users between major destinations.

Strategy:

The Snohomish County Department of Parks, Recreation and Tourism (SCPRT) should organize, manage and direct the update of its 2012 Regional Trail Planning and Management Guidelines (RTPMG) document and incorporate the findings of that process into the Snohomish County Park and Recreation Element (PRE). This strategy is wholly focused on regional trail connections between destination centers and does not address trails internal to a park facility. The county should encourage regional collaboration and public-private partnerships to increase regional visitor amenities and services to promote Snohomish County as a desirable trails destination.

Plans:

The SCPRT will coordinate with stakeholders to update the RTPMG by adding detail and identifying priorities for project completion. Stakeholders include bike and trail network providers, user groups, community members and other agencies. It is envisioned that through regional stakeholder engagement, identification of community priorities will be made as well as opportunities for connections to the county's regional system. A prioritization effort will help identify projects that should be elevated for completion. County identified priorities from this effort should be incorporated into the PRE for identification of funding, as feasible. Findings of this effort will be

shared with Snohomish County Department of Public Works to inform the next update of the Snohomish County Comprehensive Plan Transportation Element, as it relates to recreational biking.

The updated guidelines might include:

- A countywide inventory of existing bicycle and trail infrastructure, including infrastructure condition
- Identification of planned bicycle and trail infrastructure improvements
- Review of user identified needs
- Identification of opportunities for network connections and expansion
- Identification of gaps in support amenities
- Identification of opportunities for public-private partnerships

This process will result in a comprehensive countywide vision for provision of a high quality, amenity rich, bicycle and trail network that supports local quality of life and also provides a resource for visitor activities. This effort will include a prioritization of projects and an implementation plan.

Following the update of the RTPMG, The SCPRT will incorporate findings into the PRE and work with appropriate partners and stakeholders to implement the plan.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The delivery and implementation of an updated Snohomish County Regional Trail Planning and Management Guidelines.
2. Increased regional collaborations and investments that monetize trail-related activities including events, services, amenities, tours and packages that promote Snohomish County as a desirable regional trail destination.

2.3 Trails and Trail Town Development

Rationale:

There is a need to apply greater resources and attention to differentiating regions within the county with new and existing recreational trails (land and water). There is an opportunity to distinguish these regions through partnerships between co-located cities and towns along shared regional trail routes to make them more relevant to visitors. Snohomish County Parks, Recreation and Tourism (SCPRT) and Snohomish County Tourism Bureau (SCTB) should facilitate as part of regional development, foster and encourage new and stronger connections between visitor districts to shared, long-distance trails. Using concepts of “towns of the trail”, “town as trailhead” and “trailhead hubs” these associations benefit both communities and trails through combining resources and funding. These efforts will engage trail coalitions, public land managers, communities, and small businesses to organize partnerships and entrepreneurial efforts to create a sustainable and healthy trail system.

The recent example of the coalition formed around the Skykomish-Snohomish Rivers is an example of how collective engagement by multiple partners can improve the balance of environmentally sustainable outdoor recreation with exceptional visitor experiences. This collective recreation planning framework can also provide programmatic opportunities for educational information needed to interpret environmentally sensitive habitat areas, restoration efforts, and natural conditions valued by the many partnered agencies, cities, towns and federally recognized tribes who are deeply invested in these areas.

Strategy:

Snohomish County should facilitate regional engagements around new and existing trails (water, hiking, biking, equestrian and motorized). The SCPRT and SCTB should facilitate sustainable recreation planning efforts to differentiate the characteristics of each regional trail and community by highlighting shared histories and cultures and conditions of the natural environment. The SCPRT and SCTB should engage with stakeholders to foster identities using the concept of “towns of the trail”, “town as trailhead” or “trailhead hubs” as appropriate to further support fiscally and environmentally sustainable recreational practices.

The SCPRT should work with cities, towns, federally recognized tribes, trails and districts within the regional corridors to provide educational and interpretive information about protection and recovery efforts underway in sensitive habitat areas, as a primary focus of the visitor experience. These efforts should provide sustainable benefits to the many partners committed to balancing outdoor recreation, local habitat restoration efforts with creating an exemplary regional corridor and trail experience.

Plans:

The SCPRT and SCTB will follow the template already established by the successful Skykomish-Snohomish River Recreation Coalition to:

- Support existing, or create engagement around hiking, biking, equestrian and motorized trail plans and assist with securing funding to sustainably improve facilities, access, safety education, conservation, stewardship projects.
- Promote the environmental and economic benefits of the trails and trail systems to communities along shared routes, so they can plan, manage and control recreational use.
- Promote sustainable management of trail systems and foster the concepts of “towns of the trails” and “river towns” as unique Snohomish County regional tourism destinations.
- Seek to connect visitors to outdoor recreation experiences, local culture and people through quality packages and guided experiences.
- Engage with communities, small businesses, guides and outfitters to meet and fill amenity service gaps in areas where they are needed, leveraging public private partnership opportunities when possible.
- Advocate for user safety along the trails (by identifying conditions and access points, potential experience levels, and types of equipment for different sections of the trails).
- Foster respect for both public and private property along the trails.
- Promote Leave No Trace Principles and trails etiquette.
- Use environmental education as a way to create interest in the trails and to enhance sustainable development and support for school programs, youth skills, safety, traditional uses of the land/water and environmental stewardship.
- Highlight the habitat restoration, recovery and environmental characteristics of the regional trail corridors with history and heritage to engage visitors and families in diverse trail activities.

For trails and trail town projects, the Department of Parks, Recreation and Tourism (SCPRT) will devote staffing resources for regional projects to:

- Serve as a point of contact for trail planning and help coordinate public outreach.
- Organize, convene, and conduct meetings with guidance from trail coalitions and stakeholders.
- Coordinate trail concept plans as needed for new trails with recommendations for habitat restoration, recovery, interpretive and safety signage.
- Maintain a list of interested parties and stakeholders.
- Distribute meeting announcements, materials, and summaries to all interested parties.
- Coordinate technical assistance and grant applications that benefit the trail corridor.
- Serve as an organization for receiving grants and other resources for trail-related projects.
- Serve as an organizational link to government agencies, non-profit organizations, and the public.
- Help coordinate “towns of the trails” and “river towns” planning and development efforts.

Current trail projects include:

- Centennial Trail, (Snohomish to Skagit Line)
- Centennial Trail Southern Extension (Snohomish to Woodinville)
- Interurban Trail

- The Whitehorse Regional Trail (Arlington to Darrington)
- Eastern Trail Extension (Snohomish to Monroe) and Southern Extension (Monroe to Duvall)
- Western Trail Extension (Snohomish to Lowell/Everett)
- North Creek Regional Trail (Mill Creek to Bothell)

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The planning, engagement, partnerships and actions undertaken by communities, public agencies, federally recognized tribes, stakeholders and individual trail coalitions.

2.4 Visitor Capacity Planning/Traffic/Transportation

Rationale:

There is an opportunity for Snohomish County to increase cooperation between and among transit agencies to facilitate visitor transportation, with special attention regarding traffic congestion, ride-sharing programs between urban and rural areas and capacity planning on certain visitor routes / highways (i.e. US Route 2 from Everett to Leavenworth) or certain destinations (i.e. National Forest) during peak season, as well as promote alternative routes and lesser known destinations to distribute visitor traffic.

Strategy:

The Snohomish County Department of Parks, Recreation and Tourism (SCPRT) should continue to work with regional stakeholders, the County Department of Public Works, Washington State Department of Transportation, US Department of Transportation and other highway, roads and transportation related organizations and agencies to create a Visitor Transportation Strategy that identifies issues and opportunities for improving visitor-related transportation in Snohomish County.

Plans:

Snohomish County Department of Parks, Recreation and Tourism will work with regional stakeholders to continue to:

- Identify visitor-related traffic congestion points (places and times).
- Advocate for strategies and plans for fixing visitor-related congestion points.
- Assist in identifying major visitor traffic related routes and alternative transportation options
- Work collectively to implement alternative transportation options.
- Plan for future visitor-related events and activities that may create one-time or temporary traffic congestion and coordinate a collective response to reduce congestion.
- Utilize recent Puget Sound Open Space efforts, recent Forest Service studies relating to using transit alternatives to connect the urban areas to the recreational opportunities in the surrounding areas.
- Engage with U.S. Forest Service and other county officials as they research and study possible improvements along Mountain Loop Highway to communicate the potential for increased tourism activity and economic contribution that is likely to result from increased access.
- Utilize new technology and big data tools and applications to determine use patterns and capacities for sustainable planning for trails and to further protection of sensitive habitat impacted in these areas.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Ongoing communications with regional stakeholders, transit / transportation agencies.
2. Measurement of highway traffic and congestion during visitor-related events and activities on visitor-related routes.
3. New partnerships formed with agencies and departments to utilize technology such as, big data, crowd sourcing and heat map applications to aid in sustainable traffic / trail and recreation planning for Snohomish County.

2.5 Mobile Connectivity and Open Data

Rationale:

There are areas and routes frequented by visitors that do not have internet and / or cell service in Snohomish County, which limits connectivity for visitors, businesses and opportunities for operators. Mobile hotspots and social media while important to businesses and visitors, also can provide insights about traffic and use patterns not only in rural and remote areas, but throughout the county.

Strategy:

The county should work with internet and wireless service providers to identify areas and routes of Snohomish County that are frequented by high numbers of visitors or where tourism operators are located, yet do not have existing or adequate internet or cell phone coverage and create strategies and plans to provide coverage. The county should work to understand how internet hot spots, social media and heat maps can be used to understand visitor use on roadways and trails.

Plans:

The County Department of Parks, Recreation and Tourism in conjunction with county and state authorities / agencies and industry stakeholders will identify high traffic visitor areas and routes throughout the county where internet and/or wireless service is limited or does not exist or is underutilized.

The county will then engage with technology companies and/or wireless carriers in the area to create detailed strategies and plans for increasing coverage and learning how hot spots can combine user data to both inform current conditions and future planning efforts. These strategies can be repurposed to ease congestion for sustainable planning and inform visitors of traffic issues, alternate routes and other information.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Convened agency, utility and private sector leaders in an effort to provide new or enhanced insights, analytics and internet or wireless service and technology to address planning for high volume visitor areas and routes.

2.6 Visitor Wayfinding

Rationale:

There is a need to increase and improve visitor related wayfinding throughout Snohomish County in a way that is consistent, coordinated and effective.

Strategy:

The county should continue to work with state, county, local officials and regional stakeholders to establish and implement a consistent, coordinated and effective wayfinding system (physical and online) that makes it easier for visitors to find their way around Snohomish County and to / from their specific visitor destinations.

Plans:

1. The county will develop and communicate a comprehensive visitor wayfinding approach (physical and online) and implementation plan incorporating the county's destination brands, specifying design guidelines and standards for use by towns, cities, communities and visitor establishments.
2. The county will work with WSDOT to make the guidelines for signage on State highways more supportive of the county brands and promoting local visitor establishments.
3. The county will support improvements in gateway community presence in support of the county brands and its regional sub-brands.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Development, publication and communication of Snohomish County wayfinding recommendations, guidelines and design standards.
2. Engagement, cooperation and executed programs with WSDOT to improve State controlled wayfinding.
3. Regional recreational corridor wayfinding of shared long distance routes and trails.
4. Improvements and enhancements to gateway community presentation.

2.7 Lodging and Facility Options

Rationale:

There is anecdotal evidence that small-scale, alternative lodging options like tiny houses on wheels are needed in rural and remote areas of the county to accommodate visitors. There is an identified need for one-of-a-kind unique boutique / luxury / upscale / destination lodging in urban areas.

Strategy:

The county should undertake research and analysis to provide the empirical evidence necessary to properly frame the lodging / facility situation within the growth management areas. It should understand what small-scale alternative lodging options permissible in rural and remote areas and possible types and locations for additional unique boutique / luxury / upscale / destination lodging would best serve the communities of the county.

Research and analysis should consider the supply and demand relationship between lodging and meeting/event space facilities and understand desires of the local industry for additional meetings, events and activities facilities with lodging research. The county should evaluate these issues and create a strategy if necessary, to address the situation.

Plans:

The county will engage a professional hospitality lodging firm / sustainable planning consultant to conduct and deliver research and analysis of Snohomish County lodging, meeting, event, activity supply and demand including, but not limited to:

- Hotels / Resorts
- RV Parks and Tiny Houses on Wheels, Cabins, Yurts, Campgrounds
- Private Home Rentals / Airbnb / VRBO / etc.
- Weekend and Second Home Ownership
- Meeting and Convention Spaces
- Inside Sporting and Recreational, Demonstration and Event Facilities

The research will:

- Inventory current supply, current development plans and forecast the potential demand for each category of lodging, meeting, events, activity and regional geography.
- Document and analyze federal, state, county and local community rules and regulations that may be inhibiting lodging development.

- Engage with hospitality, meeting, event and activity stakeholders and the Tourism Promotion Area (TPA) Board to understand their views, priorities, perspectives on accommodations and needed event and activity space to increase overnights in Snohomish County.
- Deliver specific recommendations, strategies and plans for future needs of hospitality, meeting event facility development in Snohomish County.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The Delivery and implementation of the Snohomish County Lodging Strategy.

2.8 Aviation District and Commercial Air Service

Rationale:

Paine Field Airport, also known as the Snohomish County Airport is home to a wide variety of aviation and military history attractions including the high profile, one of a kind experience of the Boeing Tour, the Flying Heritage and Combat Armor Museum, the Museum of Flight Restoration Center, the Historic Flight Foundation, the Future of Flight Aviation Center and the new High Trek Aerial Course. Commercial air service will also be coming to Paine Field in the near future, further enhancing this site's potential as robust focal point for aviation and military history enthusiasts visiting the county.

The draw of the Boeing Tour and the addition of commercial air service to Paine Field create an excellent opportunity for the Snohomish County Parks, Recreation and Tourism Department (SCPRT) and Snohomish County Tourism Bureau (SCTB) to engage with a group of visitors who might not have otherwise selected Snohomish County for a visit.

Strategy:

The county should promote and celebrate the very successful Boeing Tour, and promote the presence of the additional aviation and military history experiences at the Paine Field Airport, and around the county. The county also has the new opportunity to expand promotion of the Paine Field Airport as an important 'front line' for introducing new visitors to what Snohomish County has to offer.

The county should leverage the draw, attention and traffic of the Boeing Tour and new commercial air service operating out of Paine Field to expand and enhance visitation to aviation and military history, both those at and around Paine Field and related attractions around the county. The county should also leverage this unique opportunity to engage visitors and promote other attractions, destinations and visitor experiences within the county.

Plans:

The SCPRT and SCTB will continue to facilitate the development of a stronger and better coordinated aviation and military cluster and continue to facilitate Aviation Attractions Roundtable that includes the Boeing Tour management and representatives from the other attractions.

The Steering Committee should focus attention on the following:

- Aviation District identity development, wayfinding, development and sharing of marketing materials and collateral, coordinated and cooperative marketing programs, coordinated and collaboratively held events as well as strong cross promotional marketing strategies to link aviation and military visitors with other aviation experiences in the various regions of county.

- The county should consider ways to integrate elements of its aviation identity to include its other aviation partners around the county.
- The county will work with other aviation attractions and events in the county away from Paine Field to ensure these assets are identified, recognized, included in and connected to the Aviation and Military Cluster.
- The county should undertake a comprehensive Strategy and Plan that considers The Future of Flight facility partially funded by the Snohomish County Public Facilities District (PFD), as the front and back door to the Boeing Tour and the most heavily trafficked Snohomish County Visitor Center, to determine the best path forward for optimal use of the facility for the overall support of the Boeing Tour and its complementary experiences.
- The facility may require new / greater investment to keep up with traffic / parking growth.

The SCTB will continue to encourage tour operators and individuals visiting the aviation and military history cluster to take in more of Snohomish County visitor opportunities through their sales and trade activities.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Visitor counts to each of the Aviation Attractions at Paine Field as well as the number of visitors that visit multiple attractions.
2. Number of Tour Operators that offer a combination of Aviation Attractions and other attractions in their sales materials and offers.
3. Plans to establish and promote a Paine Field Aviation District to leverage draw from the Boeing Tour, commercial air service for other co-located aviation experiences, promote additional off-site aviation experiences and the county as a destination overall.

2.9 Events & Festivals

Rationale:

There may be an opportunity for Snohomish County to create an Events & Festivals Strategy that engages the county, regions, towns, cities and stakeholder groups to develop, schedule, enhance, incubate, direct, market, promote and manage a portfolio of arts, cultural and sports events and festivals for residents and visitors alike.

Strategy:

The county should work with the regions to create an arts, cultural and sports events and festivals strategy to set forth the vision, goals, strategy and plans for creating, incubating and facilitating visitor-related community events and festivals in Snohomish County that increases economic contribution from visitors and enhances the quality of life for residents.

Plans:

Snohomish County Department of Parks, Recreation and Tourism (SCPRT) will facilitate an Events & Festivals Working Group of event and festival organizers, developers and operators, plus county, city and town agencies, venue managers and other interested parties to:

Agree to a vision and strategy for Snohomish County supported arts, cultural and sports events and festivals. Identify and articulate detailed funding criteria for arts, cultural and sports events and festivals that will be supported by county organized sources.

Encourage coordination of events and festivals to maximize timing and impact, while reducing seasonality swings and unsustainable high-volume visitor traffic.

The Snohomish County Tourism Bureau (SCTB) will also engage with this Working Group to organize communication, marketing and promotion of county supported events as well as other events and festivals not supported by the county, but nevertheless of potential interest to Snohomish County visitors.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The delivery and implementation of the Snohomish County arts, cultural and sports Events & Festival Strategy

2.10 Seasonality

Rationale:

Snohomish County does extremely well during the peak months of May through September, but should seek to increase overnight stays by converting day-tripper traffic to overnights in the shoulder and off-season of October through April.

Strategy:

The county will increase the priority, consideration and funding given to off-season tourism marketing, promotions and communications, group meetings and sporting event sales efforts, destination product development activities, events, festivals; and other co-produced visitor activities that extend stays and help reduce seasonality issues.

Plans:

All plans, programs, funding and grants managed, directed or undertaken by Snohomish County Department of Parks, Recreation and Tourism as well as Snohomish County Tourism Bureau will be viewed through the lens of seasonality impact with higher priority given to items that have the potential for increasing visitor overnights and spending during the months of October to April.

All plans, programs, funding and grants formally contracted by Snohomish County will include a special signatory designation to indicate that the agreement has been vetted for seasonality impact.

All grant applications associated with lodging tax funding will include priority criteria for seasonality to encourage Events & Festivals and other visitor activities to be scheduled between October and April.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Increased hotel occupancy to overnights for the months of October to April versus history.

2.11 Infrastructure Investments/Gaps

Rationale:

Over the course of this Strategic Tourism Plan project, a significant number of county officials, local leaders and industry stakeholders suggested several specific and wide ranging ideas, projects and maintenance to Snohomish County's public infrastructure and facilities that would benefit the tourism industry and increase the quality of life for residents. Many of these suggestions merit further consideration, analysis and promotion in order for them to move forward into formal viable proposals.

Strategy:

Snohomish County Parks, Recreation and Tourism (SCPRT) should create an Infrastructure Working Group to identify and prioritize infrastructure gaps. Anticipated priorities are expected to include, but not be limited to, transportation, Public Facilities Districts (PFDs), wayfinding and recreation asset improvements and maintenance. Identification of priorities should be based upon a full planning process, which identifies tourism assets, vision for a future tourism economy with consideration of regional priorities and identification of gaps limiting realization of the vision. Included in this process should be representatives from the current and potential tourism asset providers and regions where they are located. The outcomes of this process should be presented to local, city, town, county, state and federal officials and implemented at the county level when appropriate and funding is available.

Plans:

The SCPRT will convene an Infrastructure Working Group, comprised of county and local officials, regional representatives, the Snohomish County Tourism Bureau (SCTB), federally recognized tribes, tourism asset providers, PFDs and interested stakeholders. This Working Group should include The US Forest Service and other public land management agencies, as well as recreation and conservation organizations. This working group will utilize the countywide vision for the tourism economy and complete a gaps analysis to identify infrastructure needs to support the vision. The gaps analysis will result in a prioritized portfolio of infrastructure needs, including:

- Detailed project descriptions,
- Explanation of the benefit(s) the proposals might bring to Snohomish County tourism and residents,
- Estimated costs / timing / economic impact,
- Likely support from industry, residents and officials, and
- Individual and customized action plans for moving forward.

Once developed, the SCPRT will present, support and advocate for completion of the identified projects with appropriate city, town, county, state, federal and local officials and work with the same to move individual projects forward. Projects within the prevue of the SCPRT will be evaluated and prioritized for completion when appropriate and funding is available.

One example of a potential Infrastructure Gaps proposal is a multi-purpose indoor sports facility capable of hosting large regional sports tournaments such as basketball, volleyball, indoor field hockey, cheering, etc. being marketed and sold by the Sports Commission, as well as serving local residents, leagues and organizations seeking indoor facilities for their own enjoyment, sports teams and leagues.

Another example of an infrastructure gap, which is expected to be a priority for the Stillaguamish-Sauk River Valley area, is completion of the Whitehorse Trail as a connector for the recreation assets located up and down the valley.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The creation and convening of an Infrastructure Gaps Working Group.
2. The development and prioritization of projects lists, which address priorities identified through gap analysis.
3. The engagement by the SCPRT with city/town, county, state, federal, federally recognized tribes and/or local officials in support of portfolio projects.
4. The successful completion of individual portfolio projects.

3. Implementation Framework, Protocol and Funding

The following Strategies, Plans and Performance Measurements are associated with a combination of efforts focused on Destination Marketing and Destination Development.

In general, these activities are to be carried out on a regional basis by staff from the Snohomish County Tourism Bureau and the Snohomish County Department of Parks, Recreation and Tourism, in conjunction with other county officials and agencies, local cities and towns, and industry stakeholders countywide.

- 3.1 Organizational Capacity and Alignment
- 3.2 Snohomish County Department of Parks, Recreation and Tourism (SCPRT)
- 3.3 Snohomish County Tourism Bureau (SCTB)
- 3.4 Snohomish County Lodging Tax Advisory Committee (LTAC)
- 3.5 Snohomish County Tourism Promotion Area (TPA) Board
- 3.6 Lodging Tax Program/Project Funding
- 3.7 Strategic Tourism Plan and Annual Action Plans

3.1 Organizational Capacity and Alignment

Rationale:

Taking cues from Executive Sommer’s STEP initiatives for continual improvement to better serve communities, partners, staff and growth; the organizational functions of both the Snohomish County Department of Parks, Recreation and Tourism (SCPRT) and the Snohomish County Tourism Bureau (SCTB) must be organizationally evaluated for overlap, complementary services and staff resources. Simply put, we are better together.

Strategy:

The SCTB and SCPRT should perform a full organizational assessment to identify, align and cross-connect resources for staff, leadership, development, industry education, advocacy, planning and travel marketing to help reduce redundant efforts and streamline service delivery.

Plans:

The SCPRT and the SCTB will seek to co-locate to enhance capacity and resources to meet growing industry marketing, promotion and product development needs.

The SCPRT and the SCTB will evaluate current operations, structures and tasks to determine where staff are serving complementary or competing roles and functions. Operational models will be analyzed to determine how the agencies can function more effectively together and determine where adjustments are needed to better align and connect all efforts. The analysis will evaluate staffing priorities.

The SCPRT will work with SCTB Board to determine if a new name to represent the full portfolio of services is needed. The SCPRT and SCTB may consider a name like “Visit Snohomish County” to convey the scope of services available to visitors and the industry. The new title would provide a centralized point of contact for external partners and visitors, and represent an inter-agency collaboration between the SCPRT and SCTB for its various services associated with marketing, promotion, communications, meetings, group travel, sports, visitor services, industry education programs and product and infrastructure development.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Snohomish County organizational plan for SCPRT and SCTB.

3.2 Snohomish County Department of Parks, Recreation and Tourism

Rationale:

As discussed in 4.1 (above), in April 2016, Snohomish County Executive, Dave Somers, launched an economic development initiative targeting nine industry sectors, one of which is Recreation and Tourism to give private and public entities a single point of contact within Snohomish County government and to capture economic opportunities.

In discussing the relationship between Recreation and Tourism, Snohomish County reported that successful recreation and tourism initiatives are fiscally and environmentally sustainable and we intentionally develop synergy between government, business, non-profit and stakeholders.

The bottom line of this initiative is that Snohomish County Tourism has identified recreational and adventure travel as a prime target market. As a result, this market segment is a focus of sector marketing, communications, product development, capital investments and other key strategic initiatives.

Strategy:

The newly organized Department of Parks, Recreation and Tourism (SCPRT) should draw together resources from a host of sources for expertise and funding essential for environmentally and fiscally sustainable tourism programs. Coordinated engagement should produce benefits to all sectors, communities and stakeholders and can be measured by our ability to:

- Effectively implement the new Strategic Tourism Plan with the Snohomish County Tourism Bureau (SCTB).
- Implement regional initiatives to cross-connect anchor clusters, sustaining clusters and assets to increase length of visitor stay and repeat visits.
- Increase the quality, focus and needs of tourism marketing to meet changing demographics.
- Refine and capitalize on partnership with entities that support long term development initiatives for the county.
- Pursue projects of merit that greatly influence visitor perception of Snohomish County as an organized outdoor adventure recreation destination.
- Leverage outside funding resources to offset costs and increase support for new and emerging projects.
- Develop and expand public-private opportunities to help businesses provide amenities visitors require.
- Share recreational property management resources to support needed infrastructure, capacity-building and increased public access needed for recreation and tourism.
- Provide industry training and facilitation for regional recreation corridor creation.

Plans:

The SCPRT will be responsible for directing and managing all tourism efforts for Snohomish County including, but not limited to:

- The implementation, performance reporting and future updating of the Snohomish County Strategic Tourism Plan.
- The implementation, management and direction of all Destination Development activities.
- The annual reporting of Destination Development activities and development of the annual operating plan for same.
- Management and oversight of the SCTB contract for tourism marketing services.
- The activities and administration of the County Lodging Tax Advisory Committee (LTAC).
- The activities and administration of the County Tourism Promotion Area (TPA) and Board.

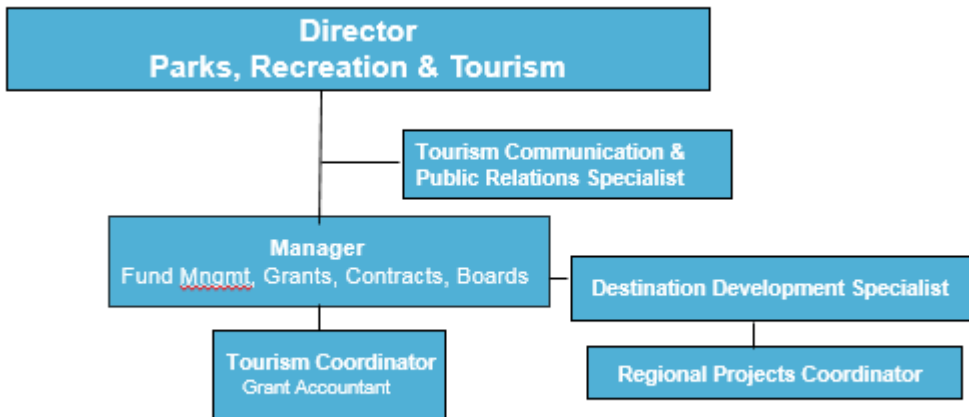
The SCPRT will be responsible for coordinating and administering all tourism-related county boards and commissions including, but not limited to:

- Lodging Tax Advisory Committee
- Tourism Promotion Area Board
- Arts Commission
- Historic Preservation Commission
- Parks Advisory Board
- Fair Advisory Board
- Conservation Futures Advisory Board
- Public Facilities District Board – Finance Department Administration

The SCPRT will also be responsible for communications and shared vision with non-county boards and commissions associated with tourism including, but not limited to:

- Snohomish County Tourism Bureau Board
- Snohomish County Lodging Association
- Economic Alliance
- City Mayors / LTACs / Chambers / Planners
- State and Federal Agencies
- Public / Private Partnerships

The SCPRT will fully fund and staff an in-house Tourism Services Office to perform and deliver these responsibilities with a suggested organization as follows:



.Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The implementation and performance of the Strategic Tourism Plan.
2. Individual performance measures set forth for Strategic Tourism Plan activities

3.3 Snohomish County Tourism Bureau

Rationale:

The Snohomish County Tourism Bureau (SCTB) is the designated, year-round, tourism and convention marketing and sales organization contracted by Snohomish County to promote the area as a desirable destination for visitors and meeting planners. The SCTB's role can be viewed as covering the public-facing service delivery aspects.

All tourism related activities undertaken by the SCTB are funded and scoped through a contract with the county, approved and signed by the County Executive. The previous contract covered a five-year period from January 1, 2011 to December 31, 2015. However, 2016 and 2017 are one-year contracts. The budget and operational plan for each year are included as attachments to the contract, and are updated on an annual basis.

The Large Fund distribution to the SCTB, set through the contract, is used to support the administration and operation of the Bureau, and to fund the Bureau's selected marketing and promotion campaigns, including projects such as advertising, website operation and brochure development, sports and convention / event sales efforts, public / media relations, visitor services, and industry training.

The Snohomish County Sports Commission, the sports department of the SCTB, is mostly funded by the TPA funds. Although the Sports Commission is earning excellent returns with year over year growth, more funding is required to grow this segment and the TPA Board is not always supportive of these programs.

Based on an analysis of the SCTB funding and its competitive set of Washington State counties, it is not maintaining a competitive level of tourism marketing and promotion investment.

Strategy:

Snohomish County should contract (3-5 year) and fully fund the SCTB to deliver the full set of Destination Marketing and Promotion activities set forth in this Strategic Tourism Plan.

Plans:

The SCTB will be responsible for directing, managing and implementing all Destination Marketing and Promotional efforts for Snohomish County including, but not limited to:

- Strategic Tourism Plan Destination Marketing and Promotional activities.
- The annual reporting of Destination Marketing and Promotional activities and development of the annual marketing plan for same.

Please note, the new Destination Development Program will be developed and implemented by the Destination and Product Development Team, within the SCPRT.

The SCTB will fully staff its operations to perform and / or deliver these responsibilities, depending on the decisions related to the comparative Business Plan(s).

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The development, implementation and performance of the Annual Marketing Plan.
2. Individual performance measures set forth for Strategic Tourism Plan Destination Marketing and Promotional activities

3.4 Snohomish County Lodging Tax Advisory Committee (LTAC)

Rationale:

The lodging tax fund is a dedicated fund authorized by state and county statute that taxes hotel and motel overnight stays and uses the receipts for the purpose of developing and promoting tourism in Snohomish County.

The purpose of County Lodging Tax Advisory Committee (LTAC) is to advise the county decision-makers on how to spend fund revenues.

The statute requires that the county LTAC consist of at least five members appointed by the county, two of whom must be representatives of businesses required to collect the tax and two of whom must be involved in activities authorized to be funded by the tax.

Snohomish County currently levies and collects the legal maximum lodging tax. The lodging tax fund has two sources, both based on taxes levied on lodging fees: small fund and large fund.

The Small Fund may be used for the following purposes:

- Acquisition, construction, improvement, or operation of convention center facilities, stadium facilities, or performance and/or visual arts center facilities.
- Payment of general obligation or revenue bonds used for the above purposes.
- Advertising, publicizing, or distributing information for the purpose of attracting visitors and encouraging tourist expansion. This can include promotional materials, development of strategic tourism plans, and other such uses.

The Large Fund may be used for:

- Acquiring or operating, either jointly or individually, tourism-related facilities.
- To pay or secure general obligation or revenue bonds issued for the purposes referenced above.
- To develop strategies to expand tourism within the county.
- To support comprehensive regional marketing for Snohomish County tourism.

Snohomish County Parks, Recreation and Tourism (SCPRT) and the Snohomish County Tourism Bureau (SCTB) are responsible for implementation of the Strategic Tourism Plan, they also provide staff assistance to the LTAC board. Snohomish County Code 4.40.070(4) states that the application process will include staff technical assistance and staff prioritization of qualifying projects. Following this process will create the opportunity to educate applicants on the strategies outlined in the STP through workshops and support the prioritization of applications based on meeting these strategies. This will take additional staff resources to support this concerted effort.

Strategy:

The county LTAC should commit its mission to the implementation of the Snohomish County Strategic Tourism Plan and establish a strategy applying the undesignated fund balance to furthering Strategic Tourism Plan activities.

Designated Funds in Small and Large Fund monies may include:

- Acquisition, construction, improvement, or operation of convention center facilities, stadium facilities, or performance and/or visual arts center facilities, or payment of general obligation or revenue bonds used for these purposes;
- Advertising, publicizing, or distributing information for the purpose of attracting visitors and encouraging tourist expansion; and
- Maintaining required fund reserves established by the county LTAC.

Plans:

At the end of each fiscal year, the county LTAC will calculate the unobligated fund balance available from the Small and Large Funds and ask Snohomish County Department of Parks, Recreation and Tourism for a Business Plan for the usage of the unobligated fund balance, based on specific Strategic Tourism Plan activities.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The county LTAC's buy-in and application of the Strategic Tourism Plan.
2. The county LTAC's allocation of excess Large Fund monies to Strategic Tourism Plan activities.

3.5 Snohomish County Tourism Promotion Area (TPA) Board

Rationale:

A Tourism Promotion Area (TPA) is an established geographic boundary, within which lodging establishments can choose to assess, as a group, an additional fee on each room-night of lodging they sell. TPA assessment revenues may be used to fund tourism promotion and development activities.

The County Council has final authority about how to use the money to promote tourism after they consider the recommendations of the TPA Board. The Snohomish County TPA Board has 14 members, nine lodging members (one from each of the five county council districts and four at-large) and five non-lodging members.

Use of these funds is regulated by RCW 35.101, which defines eligible tourism promotion costs as “activities and expenditures designed to increase tourism and convention business, including but not limited to advertising, publicizing, or otherwise distributing information for the purpose of attracting and welcoming tourists, and operating tourism destination marketing organizations.”

Under these criteria, the Snohomish County Sports Commission (which is under the Snohomish County Tourism Bureau), and arts, culture, festivals, and sports organizations that bring an actual return on investment in overnight hotel stays as a result of their marketing efforts are eligible to compete for the funds. Personnel or administrative costs are generally not funded by the TPA grant.

There is no guarantee that the Snohomish County Sports Commission will receive funding from the TPA.

Although the TPA Board includes nine lodging members, they may or may not be associated with the Snohomish County Department of Parks, Recreation and Tourism, which is responsible for the Strategic Tourism Plan or the Snohomish County Tourism Bureau, which is one of the primary implementers of the Strategic Tourism Plan and parent organization of the Snohomish County Sports Commission.

Strategy:

The TPA Board should commit its mission to the implementation of the Snohomish County Strategic Tourism Plan.

The TPA Board should establish a strategy applying the undesignated fund balance to furthering Strategic Tourism Plan activities.

Plans:

The TPA Board should re-set its funding criteria with priority given to implementation of the Strategic Tourism Plan.



Performance Measures and Assessment:

Success of this strategy will be measured by:

1. TPA support and funding for implementation of the Strategic Tourism Plan.

3.6 Lodging Tax Program/Project Funding

Rationale:

Nearly \$6.5 million in Lodging Taxes are re-invested in Snohomish County each year by the communities who collect the tax. There are a number of local LTACs, each with their own funding priorities to drive tourism in their communities. To increase collaboration and partnered efforts with County Lodging Tax investments, greater awareness and coordination between efforts of individual LTACs is needed.

Strategy:

Snohomish County should better understand the funding priorities of the broad collection of local LTACs. The county should facilitate workgroups between the LTACs and communities, in each region, to identify shared funding priorities that support implementation of the Strategic Tourism Plan. These shared priorities should be organized to address sustainable regional destination development, off-season opportunities, marketing, promotions, event strategies and infrastructure challenges to grow tourism revenues overall.

Plans:

Snohomish County Parks, Recreation and Tourism (SCPRT) and Snohomish County Tourism Bureau (SCTB) will facilitate countywide meetings and/or workshops for local LTACs and the Tourism Promotion Area Board at the minimum of once per year, prior to the annual funding cycle. All communities will be invited to discuss and share local funding priorities, criteria and timing for applicants. Goals of the effort will include: discovering common issues, challenges and themes for funding, determinations about how much is invested for local events, visitor marketing and infrastructure development by the communities to understand the bigger picture.

The SCPRT and SCTB will engage regional work groups to further analyze these shared priorities and challenges in order to cross-connect these partners; to assess scope and develop needed industry planning and workshop programs; and to better capitalize on shared resources needed to improve tourism development and equity of all lodging tax investments.

The coordination and organization of lodging tax investments should target and include shared priorities for implementation of the Snohomish County Strategic Tourism Plan in a phased approach.

To foster on-going collaboration between the many LTACs and regions, Snohomish County may consider new County LTAC Small Fund Grant scoring criteria for applications for specific projects and activities identified as regional priorities for tourism development.

The county may consider an annual technical assistance award program to provide trainings, facilitated workshops and resources for rural communities which do not receive Lodging Taxes, and face specific

infrastructure and organizational challenges for visitor development. These programs will help the communities and DMOs develop capacity for visitor readiness and establish ways to partner with and promote other regions.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. Assessment of regional tourism opportunities.
2. Number of communities involved in regional work group planning and development activities.
3. Established regional tourism development priorities.
4. Increased alignments between county and local LTACs' funding priorities to implement the Strategic Tourism Plan.

3.7 Strategic Tourism Plan and Annual Action Plan

Rationale:

In updating the Snohomish County Strategic Tourism Plan, the project team identified several issues with the 2010 Plan that made it problematic to implement including, but not limited to:

- The specificity of the plan was helpful in some instances, but problematic in others.
- The specific timeline outlined in the plan created inflexibility among decision-makers that took the plan verbatim and not as a structural framework.
- Some decision-makers felt if they did not follow the plan exactly as written, they were constrained from leveraging logical and evolving opportunities, and could be held accountable for not pursuing efforts that did not make sense in the changing environment.
- Staff suggested that the plan update could provide more flexibility through general recommendations with language that it is suggested, but not mandatory. This could also be accomplished by providing a more general framework and less detail in the Goal-Strategy-Task organization employed in the 2010 Plan.

Strategy:

The 2018-2022 Strategic Tourism Plan should provide strategic recommendations for Snohomish County officials and agencies to guide tourism in the county over the next five years, while allowing the county Executive; County Council; Snohomish County Department of Parks, Recreation and Tourism (SCPRT); and Snohomish County Tourism Bureau (SCTB) the flexibility to create and implement annual operating plans based on performance-to-date, available resources and changing conditions.

Plans:

SCPRT will produce an annual report of progress-to-date against the 2018-2022 Strategic Tourism Plan, followed by an annual operating plan with activities, programs, organizational resources, funding and timing necessary to move the 2018-2022 Strategic Tourism Plan forward.

SCTB will produce an annual report of progress-to-date against the 2018-2022 Strategic Tourism Plan, followed by an annual marketing plan with activities, programs, organizational resources, funding and timing necessary to move the 2018-2022 Strategic Tourism Plan forward.

Performance Measures and Assessment:

Success of this strategy will be measured by:

1. The delivery of two annual reports of progress-to-date against the 2018-2022 Strategic Tourism Plan for the SCPRT and SCTB.
2. The delivery of an annual operating plan for SCPRT.
3. The delivery of an annual marketing plan for SCTB.

Conclusion

This Strategic Tourism Plan update, the re-organization of tourism from the Snohomish County Department of Economic Development to the Department of Parks, Recreation and Tourism plus the upgrading of tourism efforts in Snohomish County from simply tourism marketing to tourism marketing and management have provided an enormous opportunity for the county to re-think its long-term vision for the industry and its potential impact on Snohomish County, its economy, its visitors and its residents.

This new vision is clearly captured by this Strategic Tourism Plan, and by doing so should re-orient the many Snohomish County and city / town executives, officials, departments, agencies and staff, as well as the various boards of directors and committees charged with managing individual parts of the industry, and the many stakeholders and volunteers who have invested considerable time, effort and capital to build their businesses and organizations.

Although it would be presumptuous for the county to suggest that the Strategic Tourism Plan should now be used to guide all these efforts, all these groups, all these individuals and all these decisions, the purpose of the Strategic Plan is to set a vision and work with all those stakeholders to chart a course for realizing the vision.

We trust that the Strategic Tourism Plan process has opened doors that were previously closed and created discussion where there previously was none. There is still a lot of work to do, but this update of the Strategic Tourism Plan is a giant step forward.

Appendices

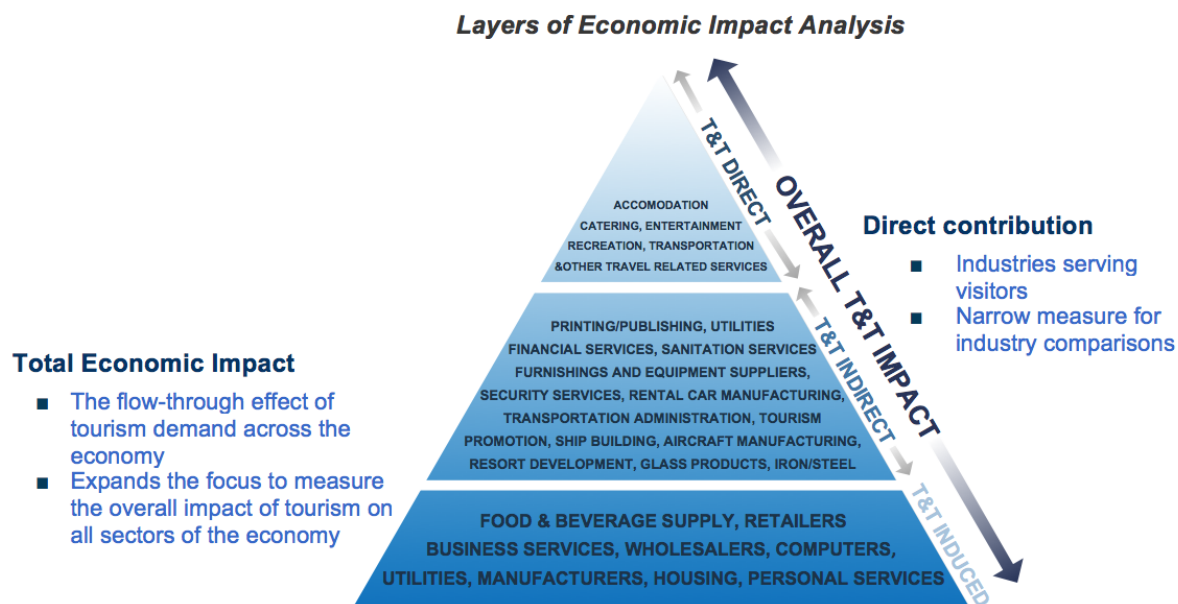
Importance of Travel & Tourism

Most economic sectors, such as agriculture and financial services, are easily defined within a state or county's economic statistics. This is because these are distinct economic sectors with measurable employment and production value.

However, the Travel & Tourism sector is not so easily measured because it is not a single industry. Travel & Tourism spans nearly a dozen sectors including lodging, recreation, retail, real estate, air passenger transport, food & beverage, car rental, taxi services, and travel agents. It is intrinsically a demand-side activity, defined by visitors, which affects multiple sectors to various degrees.

The Travel & Tourism sector also employs a diverse range of people, including hotel front desk clerks to casino owners. Residents in every community, large and small, rural and urban, are engaged in tourism activities.

The following diagram illustrates the scope of Travel & Tourism's economic impact in destination communities like Snohomish County.



Based on research by Dean Runyan & Associates, Travel & Tourism is a key economic engine and creator of jobs for Snohomish County.

In 2015, visitors spent \$934.5 million in Snohomish County, an increase of 3.7% on 2014 or an annualized 3.9% increase between 2000 and 2015. Total travel spending resulted in total state and local tax revenue of \$99.3 million.

In the previous year, visitor spending generated direct employment of 10,450 jobs or 3.0% of total Snohomish County employment in 2014, and is growing at an annualized rate of 1.3% between 2000 and 2015. The total of indirect jobs (suppliers to the tourism industry) is usually very similar in size to the number of direct jobs produced by visitor spending, so Snohomish County Tourism could actually be responsible for over 20,000 direct and indirect jobs.

Snohomish County Direct Travel Impacts, 2000-2015p

	2000	2005	2010	2014	2015p	Annual % Chg.	
						14-15p	00-15p
Spending (\$Million)							
Total (Current \$)	577.8	694.0	827.1	996.1	1,013.5	1.8%	3.8%
Other	51.3	65.3	80.9	94.6	79.0	-16.4%	2.9%
Visitor	526.5	628.6	746.2	901.5	934.5	3.7%	3.9%
Non-transportation	449.6	525.0	616.7	748.6	788.2	5.3%	3.8%
Transportation	76.9	103.6	129.5	152.8	146.3	-4.3%	4.4%
Earnings (\$Million)							
Earnings (Current \$)	157.7	184.0	210.1	258.6	273.9	5.9%	3.7%
Employment							
Employment	8,840	9,050	9,570	10,450	10,750	2.9%	1.3%
Tax Revenue (\$Million)							
Total (Current \$)	53.9	66.4	77.7	94.7	99.3	4.8%	4.2%
Local	15.8	20.6	24.1	31.3	33.1	5.7%	5.0%
Visitor	8.9	12.5	14.7	19.9	21.1	5.7%	5.9%
Business or Employee	6.9	8.1	9.3	11.4	12.0	5.6%	3.8%
State	38.1	45.8	53.6	63.4	66.2	4.4%	3.8%
Visitor	29.1	35.2	41.8	49.0	50.9	3.9%	3.8%
Business or Employee	9.0	10.6	11.8	14.4	15.3	6.0%	3.6%

Source: Dean Runyan Associates

Additional research from Dean Runyan shows that Snohomish County tourism produces one new job for each additional \$88,660 of visitor spending in the county. In addition, for each \$100 of visitor spending, \$28 of employee earnings is generated and \$3.50 of tax revenues is generated.

SNOHOMISH COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2015p)

Amount of Visitor Spending that supports 1 job	\$88,660
Employee Earnings generated by \$100 Visitor Spending	\$28
Local Tax Revenues generated by \$100 Visitor Spending	\$3.50

Visitor Volume (2015p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$72,230
Additional employment if each resident household encouraged one additional overnight visitor	815

Visitor Shares

Travel Share of Total Employment (2014)*	3.0%
Visitor Share of Taxable Sales (2014)**	5.1%
Overnight Visitor Day Share (2015p)***	2.7%

Source: Dean Runyan Associates

Finally, within Washington State in 2015, Snohomish County is the 4th largest county producer of tourism spending at \$934.5 million after King County (\$6,937.2 million), Pierce County (\$1,006.1 million) and Spokane County (\$947.0 million).

Open Up

In 2012, The Snohomish County Tourism Bureau on behalf of the community, its stakeholders, and branding partners contracted with North Star Destination Strategies to determine the county's true, unique and relevant brand position to help the area stand out in the marketplace.

In this process, North Star determined Snohomish County's most relevant and distinct promise. From that promise, North Star created a strategic platform intended to generate a brand position in the minds of residents, visitors and businesses. North Star then developed Brand Action Ideas and a Brand Identity Package (creative expressions), all of which are designed to reinforce the positioning and ensure brand equity and growth.

The process was divided into four stages: Understanding, Insights, Imagination and Evaluation.

A summary and highlights from the North Star work follow below. For more detail, please refer to Snohomish County Open Up, North Star Brand Print Report (April 12, 2013).

Understanding (Research findings):

North Star conducted more than fifteen pieces of quantitative and qualitative research to identify what differentiates Snohomish County from its neighbors and competitors. By examining the community (stakeholders, residents), consumers (visitors, regional and state officials in tourism) and the competition (neighboring communities), North Star determined a strategy for Snohomish County to assert across all community assets to implement an effective, meaningful and relevant brand.

Strengths

Most-often mentioned strengths throughout North Star's research.

Twenty-two cities and communities comprise Snohomish County. This spectacular community in Northwest Washington is vast! Research confirmed that Snohomish County is indeed a diverse community with six major asset themes: aviation, shopping, business and event-based visitation, gaming, sports and outdoor recreation. However, focusing on a diverse number of assets and various themes is not distinct enough to stand out in today's crowded marketplace of compelling destination brands.

Research uncovered that Snohomish County's location and natural beauty are a dynamic duo! Snohomish County is the quickest way to get outside in the Greater Seattle area. But outside means so much more than outdoor recreation. It's where visitors can get outside the urban sprawl and into true outdoor recreation, to pursue a big win, to discover the past through heritage attractions, to get off the ground and into the sky, to explore dozens of diverse communities, each with their own charm and quirkiness, and finally Snohomish County is where you can get outside and pursue your passions.

By leveraging the geography of Snohomish County – its proximity to Seattle, location on I-5 and the great outdoors – you can provide a staycation or true vacation for visitors. Snohomish County should be positioned as a complementary destination to Seattle. Identifying Snohomish County as near Seattle will help visitors become more familiar with the area's location and endless opportunities for exploration.

Weaknesses

Most-often mentioned weaknesses throughout North Star's research.

As mentioned briefly above, Snohomish County is a vast region that is very diverse. Each community's topography, attractions and activities are wholly unique. As you travel from one side of the county to the other, you'll encounter mainstream shopping, baseball diamonds, performing arts venues, towering mountain ranges, rushing rivers and the Pacific Ocean. According to research, diversity contributes to the county's identity problem. Many felt that by trying to be too many things to too many people, the county was not positioning itself as a unified destination with a clear benefit to the visitor.

Another identified weakness is a lack of awareness of the county as a destination for visitors. Some felt that standing in the shadow of Greater Seattle and King County was a disadvantage. Snohomish County seems both too far from King County for a quick visit and too close for an overnight visit.

Other challenges cited in the research included traffic congestion in the western part of the county, a lack of public transit options and funding.

These challenges make it clear that the communities in Snohomish County will benefit greatly from a cohesive brand message. Based on the Tapestry Segmentation Study, Snohomish County has a distinct target audience that shares inclinations towards active pursuits, being tech-savvy, fit-conscious and a preference for an exurban lifestyle. Armed with this information, Snohomish County should be able to establish a clear identity in the minds of visitors in the near future as a destination that invites you to open up to discovery, to adventure, and to life.

Opportunities

Most-often mentioned opportunities throughout North Star's research.

The most-often mentioned opportunity for Snohomish County was outdoor recreation. With Greater Seattle nearby as a top visitation market, it's clear that there are some things that the city can't offer – outdoor recreation and natural beauty. Snohomish County has an opportunity to be the hub for outdoor recreation in Northwest Washington.

Interestingly, diversity was mentioned as a challenge for Snohomish County, but also an opportunity. Because of the county's range of activities and attractions, there's a need to better promote available offerings to consumers. Getting the word out about what Snohomish County has to offer is seen as the best avenue for tourism growth.

Many of Snohomish County's assets (related to outdoor recreation and beyond) were also identified as opportunities for future growth – either through marketing or packaging. Some assets mentioned in this light were hiking trails, fishing and boating opportunities, agritourism, shopping, and arts.

Threats

Most-often mentioned threats throughout North Star's research.

Stiff competition from Seattle and surrounding areas is both a challenge and a threat. If Snohomish County fails to carve out a true and distinct marketing position, it threatens to lose visitors to its competitors. According to research, other threats include a general lack of awareness of the area and a lack of funding for the destination marketing organization – Snohomish County Tourism Bureau.

It's important to consider that Snohomish County residents who are uninformed about the area's assets can lead to brand adversaries rather than brand advocates. The local community will need to be briefed periodically to understand the important role tourism plays in Snohomish County's economy and beyond.

Summary of Insights (Conclusions based on research)

Research revealed that Snohomish County's greatest asset is its access to the outdoors. The three descriptors that were most often given for the area included beautiful, recreation and proximity to Seattle. These words paint a clear picture of the benefit of Snohomish County.

North Star discovered that the county's location between Seattle and Canada along I-5 offers visitors a quick escape route to the great outdoors. Snohomish County gives visitors a chance to explore the natural beauty of Washington State. Because visitors are pursuers of active lifestyles, according to research, it's fitting that Snohomish County offers a diverse number of pursuits from extreme recreation to a big casino win. Truly, all of Snohomish County's asset themes – aviation, shopping, business and event-based visitation, gaming, sports, and outdoor recreation – can fit under the umbrella idea of getting outside and opening up.

The area's relaxed and inviting vibe encourages visitors to open up! The idea of "Open Up" connects all aspects of Snohomish County. In one breath-taking view, you can take in unrivaled beauty. So whatever you're up for – whether camping or canoeing, kayaking or casinos, shopping or restaurants, aviation or the arts – we invite you to open up...to life, to adventure, and to discovery.

The Brand Platform

The brand platform is used as a filter for the formation of creative concepts and implementation initiatives. All communications, actions and product development should connect to the essence of this relevant and defining statement.

Target Audience	For those wanting to explore and pursue, (extreme recreation, a great buy, a big casino win)
Frame of Reference	between Seattle and Canada along I-5 and barely contained by Puget Sound and the Cascades,
Point-of-Difference	Snohomish County is where Seattle gets outside (escapes, gets outdoors, where Seattle meets the outdoors, go out socially, go out shopping, get outside of yourself)
Benefit	and opportunities open up.

Imagination (Creative ideas for building the brand)

The brand platform serves as a guide for the positioning of the Snohomish County brand. From this statement, a creative concept is born; a concept that aligns creative treatments of the brand in a variety of communication mediums and action ideas.

The creative concept developed by North Star is based on the approved brand platform positioning Snohomish County as the place where Seattle gets outside and opportunities open up. Unlike Seattle, Snohomish County provides quick access to the great outdoors.

Not only is Snohomish County the hub of outdoors recreation in Northwest Washington, it's also the place where visitors can escape, get outside themselves and their everyday lives to explore their own passions and pursuits. "Open Up" provides flexibility for the many communities that call Snohomish County home. It serves as the umbrella that embraces a wide range of attractions, activities and communities.

The visual executions of the brand, imagery, graphics and language reinforce the idea of how Snohomish County allows visitors to "Open Up." Because Snohomish County is a mixture of rural and urban, communities and pursuits, a strictly typographic logo was selected to draw attention to the destination as a whole, instead of just one element. The font resembles a hand-drawn script that warmly invites visitors to experience the county's splendor. By positioning the strapline underneath the destination name and keeping it uncontained, visitors are drawn to the possibilities of how they can "Open Up" in Snohomish County. The color palette is filled with earth tones that embrace the natural assets that are abundant in the region.

Visuals reflect many of the words discovered during the research process such as discovery, curiosity, opportunity, leisure, and exploration. In many recommendations, North Star used an asset theme for the main image and supported it with smaller images of area attractions and activities. This method allows Snohomish County to cater to a specific target market from outdoor enthusiasts to shoppers.

By featuring a variety of attractions and activities, Snohomish County is approaching consumers with an invitation to pursue what interests them in a relaxed, laid-back way. Fun, punchy headlines remind visitors that Snohomish County isn't a buttoned up destination...you can truly Open Up!

Destination Marketing and Management Roles and Responsibilities

In Snohomish County Washington, there are a number of county government officials, staff, boards, commissions and a bureau that are directly involved in the planning, development, marketing and promotion, and execution of tourism-related activities. In addition, there are a number of other county officials and staff that are indirectly involved in providing services to Snohomish County visitors or tourism businesses. The following section sets forth the primary players in Snohomish County tourism, the roles they play in the industry and the responsibilities they have for delivering on the industry potential. In the main part of this document, recommendations are made to update these roles and responsibilities and how the entities should collaborate and work together to best implement the Strategic Tourism Plan.

County Executive and County Council



Dave Somers, Snohomish County Executive

The county executive is elected to a four-year term and is limited to serving three terms in office. The executive oversees and administers county government to ensure that it meets the County Charter, state constitution, and other applicable federal, state and local laws. Dave Somers is the current Snohomish County Executive.

The Executive

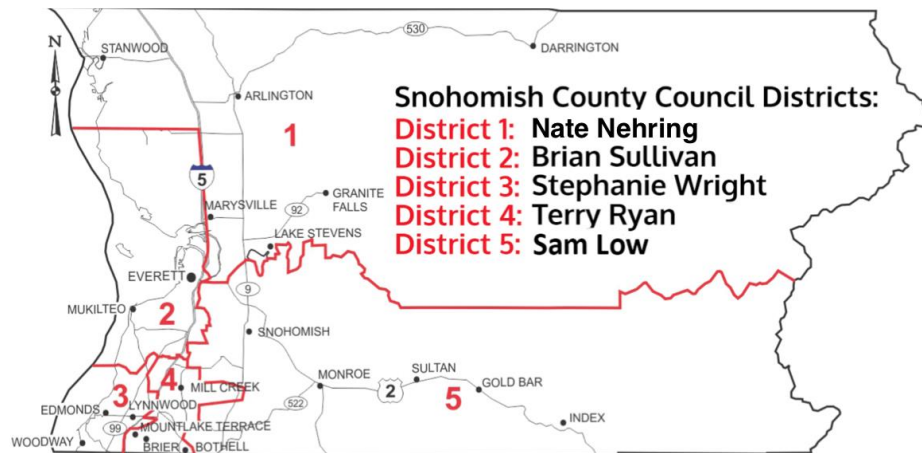
- Supervises executive departments
- Enforces ordinances and statutes within the county
- Presents an annual state of affairs to the County Council
- Prepares and presents an annual budget
- Prepares and presents comprehensive capital improvement plans for current and future development
- Nominates members to county boards and commissions

County Council



Left to Right: Terry Ryan, District 4, Nate Nehring, District 1, Sam Low, District 5, Council Chair Brian Sullivan, District 2, Council Vice-Chair Stephanie Wright, District 3

The Snohomish County Council is the legislative authority for the county. The five members of the council are elected to four-year terms. Each member represents a specific geographic district.



Council Duties

The council's duties include identifying and articulating the needs of the citizens of Snohomish County, and providing a framework for county administration to carry out its work efficiently, ensuring that county government responds effectively to the community's needs. The county council adopts and enacts ordinances, resolutions, and motions; levies taxes; appropriates revenue; and adopts budgets for the county. The council confirms nominations to county boards and commissions.

Snohomish County Department of Parks, Recreation and Tourism

In April 2016, Snohomish County Executive, Dave Somers, launched an economic development initiative targeting nine industry sectors, one of which is Recreation and Tourism. The purpose of this economic development initiative is to give private and public entities a single point of contact within Snohomish County government and to capture economic opportunities.

The initiative focuses on three areas:

- Facilitating public-private partnerships
- Promoting economic opportunities
- Meeting industry needs

In discussing the relationship between Recreation and Tourism, Snohomish County reported that successful recreation and tourism initiatives are fiscally and environmentally sustainable and they intentionally develop synergy between government, business, non-profit and stakeholders.

Additionally, the Recreation and Tourism sector plans for environmentally and fiscally sustainable growth by evaluating and prioritizing with the greatest potential for collaboration. Bringing economic development full circle: a positive feedback loop from job creation, to culturally rich communities, and growing local and regional economies. In fact, Snohomish County is a regionally significant recreation and tourism hub with the county boasting an annual \$2 billion dollar outdoor recreation industry and an additional \$1 billion dollar tourism industry.

Further, overnights in Snohomish County are comprised primarily of business travel. However, the lodging industry has determined that active recreation can fill vacancies on weekends and during shoulder seasons with good return on investment.

The bottom line is that Snohomish County Tourism has identified recreational and adventure travel as a prime target market. As a result, this market segment is a focus of Sector marketing, communications, product development, capital investments and other key strategic initiatives.

Prior to this initiative, the Departments of Parks & Recreation, and Tourism & Economic Development were separate functions of county government. However, by acting as an organizational facilitator, the newly organized Department of Parks, Recreation and Tourism will draw together resources from a host of sources for expertise and funding essential for environmentally and fiscally sustainable tourism programs. Coordinated engagement will produce benefits to all sectors, communities and stakeholders and can be measured by the ability to:

- Effectively implement the new Strategic Tourism Plan with the Snohomish County Tourism Bureau.
- Implement regional initiatives to cross-connect anchor clusters, sustaining clusters and assets to increase length of visitor stay and repeat visits.
- Increase the quality, focus and needs of tourism marketing to meet changing demographics.
- Refine and capitalize on partnerships with entities that support long term development initiatives for the county.

- Pursue projects of merit that greatly influence visitor perception of Snohomish County as an organized outdoor adventure recreation destination.
- Leverage outside funding resources to offset costs and increase support for new and emerging projects.
- Develop and expand public-private opportunities to help businesses provide amenities visitor require.
- Share recreational property management resources to support needed infrastructure, capacity-building and increased public access needed for recreation and tourism.
- Provide industry training and facilitation for regional recreation corridor creation.

Our Strategy

The new Department of Parks, Recreation and Tourism will work in close collaboration with the business community, state and federal agencies, federally recognized tribes, industry leaders, non-profits and local stakeholders. Collaboration is priority number one.

It will make informed decisions in preserving natural spaces and seamlessly integrating the built environment, create and nurture fiscally and environmentally sustainable infrastructure.

And, they believe understanding and catering to the target audience in an environment of collaboration is priority one.

Our Mission

The mission of Snohomish County Parks, Recreation and Tourism is to:

- Promote the value and vitality of Snohomish County through environmentally and fiscally sustainable tourism, recreation and economic development initiatives;
- Meet industry, resident and visitor needs through partnerships, developing infrastructure, creating fiscal and environmental sustainability; and
- Enhance Snohomish County's identity as a premier destination for recreation and tourism.

Recreation & Tourism Action Items

To fulfill the Department's Mission, a number of Recreation & Tourism action items have been articulated:

- Expanding strategic capital expenditures that focus on adventure, like promoting public – private partnerships to support needed concessions, rentals, guide services, transportation infrastructure.
- Developing adventure based assets, like pursuing national designations with public agencies of existing assets for national recognition and competitive funding.
- Developing a cluster of tournament-ready athletic fields.
- Creating strategic capital trail acquisitions where possible.
- Funding regional assessments for lodging and recreation.
- Providing industry training and support about capturing trail-based tourism.
- Supporting development of the new Snohomish County Strategic Tourism Plan ensuring strategies address emerging development opportunities.

- Expanding and promoting regional collaborations with recreation, conservation, land management agencies, jurisdictions and organizations.
- Aligning efforts with the Snohomish County Tourism Bureau to ensure assets, opportunities and routes are clearly highlighted connecting visitors to tourism opportunities in Snohomish County in new, meaningful ways.
- Determining how incentives and infrastructure projects can further leverage the identity and goals of the Recreation and Tourism Sector.
- Pursuing wayfinding, and clear designated access points.
- Pursuing infrastructure gap assessments.
- Involving the Evergreen State Fairgrounds in the adventure travel industry.

Snohomish County Tourism Bureau (SCTB) and Board of Directors

The Snohomish County Tourism Bureau is a non-profit 501c(6), non-membership economic development agency responsible for the year-round professional tourism marketing of Snohomish County, Washington. The Snohomish County Tourism Bureau (SCTB) is the marketing organization responsible for presenting the county as a desirable visitor and group destination. The Bureau is in its 22nd year of operation.

The Snohomish County Tourism Bureau creates and directs marketing, promotions, campaigns, visitor services, public / media relations and assists area businesses with tourism development by providing educational seminars, training sessions and cooperative advertising opportunities. The Bureau offers a graphic standards kit for organizations interested in adopting the Snohomish County Tourism brand.

Board of Directors

The management of all the affairs, property and interests of the corporation is vested in a Board of Directors composed between eleven (11) and twenty-one (21) members who shall provide diverse representation from tourism, general business and public sector interests to reflect countywide geographic balance. The intent is that the lodging industry shall represent the majority with the remaining members representing the tourism industry and related local business and government elements. There are two classes of Directors: voting and non-voting ex-officio. Voting directors are elected by the members and must be active members in good standing. Ex-officio, non-voting members may be added to the board at the board's discretion to provide input from under-served industry categories, skill sets or perspectives.

The 2017 Snohomish County Tourism Bureau Board of Directors includes:

Robert McChesney, Board Chairman - Port of Edmonds
Kerri Lonergan-Dreke, Chair Elect - Lombardi's Italian Restaurant
Sara Blayne, Secretary - Lynnwood Convention Center
Andrew Heelas, Treasurer - Holiday Inn Express & Suites, Lynnwood
Sam Askew, Board Member - Tulalip Resort Casino & Spa
Jennifer Caveny, Board Member - Holiday Inn Express, Marysville
Brian Davern, Board Member - Mill Creek Business Association
Lisa Martin, Best Western Sky Valley Inn
Ethel Marzolf, Ex-officio - Everett Mall
Laura McDaniel, Board Member - Angel of the Winds Casino Hotel
Bria Miller, Board Member - Best Western Cascadia Inn, Everett
Mathew Smith, Board Member - Economic Alliance Snohomish County
Melissa Springer, Board Member - Hampton Inn Seattle/Everett Downtown
Judy Tuohy, Board Member - The Schack Art Center, Everett
Annieque Bennett, Ex-officio - Snohomish County Tourism Promotion Area
Tom Teigen, Ex-officio - Snohomish County Parks

Mission

We promote, develop and expand tourism into and within Snohomish County. We are the designated leader in developing a well-funded, progressive, collaborative and ongoing marketing program. We encourage exploration and enjoyment of Snohomish County's diverse natural, cultural and recreational opportunities.

Vision

The Snohomish County Tourism Bureau will be the catalyst of development of tourism and the progressive leader in the destination marketing of Snohomish County leading Snohomish County to become the exceptional visitor experience of the Pacific Northwest.

Values

The Snohomish County Tourism Bureau creates a culture of collaboration, inclusivity, responsiveness and transparency while upholding the values of honesty, respect and fairness in a progressive and welcoming environment.

Goals

The Snohomish County Tourism Bureau's Marketing and Operational Plan for 2017 sets forth the following goals for the organization:

General Marketing

- Position Snohomish County as a robust and desirable tourism destination through the implementation of the brand throughout all marketing channels.
- Develop, implement and administer marketing programs and strategies designed to create a greater awareness of Snohomish County as a primary visitor destination.
- Offer cross-promotional opportunities to attractions and hotels to expand the visitor experience.
- Expand online marketing promotional options to tourism businesses through multiple online platforms.
- Market Snohomish County as a leisure travel destination to key feeder markets of British Columbia, Canada, western states and regionally within Washington State targeting the demographic and psychographics of the identified target markets from the brand research.
- Continue expanded reach to local visitors at key attractions/venues through personal and electronic means.
- Involve the private sector and various community, outdoor adventure travel outfitters and landowners, arts, heritage and cultural organizations in tourism marketing programs to coordinate synergistic results with anchor cluster and anchor attractions as well as sustaining clusters and assets as identified in the 2010 Strategic Tourism Plan.

Convention and Group Tour Sales and Services

- Market and position Snohomish County as a prime location for conventions, conferences, sporting events, military reunions and group tours through participation in trade shows, sales missions, advertising and media in selected markets and providing familiarization tours for event planners and the media.

- Prospect potential groups and organizations and share potential leads with Snohomish County organizations including county facilities and attractions, hotels, B&B's, privately owned banquet facilities, parks, and publicly owned facilities as appropriate.
- Assist in establishing and participate in cooperative relationships with county attractions, hotels and independent meeting and event facilities, activities, state and regional tourism marketing organizations and community development organizations in order to achieve synergistic results.

Sports Tourism Sales and Services

- Advocate for and request continued and expanded financial support of the Snohomish County Sports Commission through the tourism promotion area (TPA) application process.
- Working with the Snohomish County Sports Commission board of directors, local venue owners and user groups, advocate and facilitate the addition of sports venues to accommodate amateur athletics and actively work with sports venues and event organizers to increase sports related business in Snohomish County.

Public Relations and Communications

- Position Snohomish County as a desirable travel destination by working with identified travel writers and travel publications to gain local, regional and national exposure through targeted public relations efforts.
- Increase awareness of Snohomish County as a primary visitor destination; increase visitation; promote soft adventure and outdoor recreational opportunities; support facility, community and attraction developments with support of press releases and inclusion in media newsletters and via social media platforms.
- Develop and implement a strategic media relations program including electronic press kits, database of local, regional and national media and bloggers; establish relationships with freelance writers; conduct media FAM tours.

Tourism Development

- Support the growth of the outdoor adventure travel segment with a potential assessment, educational programming and strategy development while working with rural communities to develop tourism products with a focus on outdoor and adventure travel.

Visitor Services Program

- Provide excellent customer service in-person, on the phone, and through correspondence at the VICs and the SCTB office, as well as through the SCTB web site.
- Positively represent the tourism interests of the communities, businesses and organizations in Snohomish County and the surrounding region.
- Maintain a well-trained staff that is able to assist our visitors and neighbors with up-to-date and accurate information.
- Maintain the SCTB Visitor Services Program as the designated leader for visitor services in Snohomish County.

- Maintain and continuously develop a dynamic and knowledgeable volunteer base to staff the VICs including mobile VICs. Include program components of recruitment, orientation, training, retention, recognition and motivation.
- Ensure safe, pleasant and clean VIC facilities. Create positive partnerships with all parties involved with the maintenance and upkeep of the facilities.
- Efficiently manage the VIC budget while meeting the needs of staff and visitors. Ensure continued funding through Snohomish County and Snohomish County cities. Explore additional funding opportunities to sustain and grow the program.
- Continuously create a positive image in the community. Be a resource to other visitor services programs by providing the Snohomish County Visitor Guide for distribution as well as other bureau publications as available. Be a source of information and training for local visitor services and volunteer programs. Bring the community into the VICs by hosting community projects. Provide VIC volunteers with the opportunity to extend their service beyond the VICs.
- Proactively promote tourism spending in Snohomish County through VICs and online visitor information. Provide information, referrals, and recommendations to encourage visitors to stay overnight and explore all that Snohomish County has to offer. Respond to visitor requests via e-mail, through the website and postal mail correspondence. Ensure distribution of Snohomish County tourism guides and provide avenues for distribution of promotional materials from tourism businesses, communities, chambers and organizations in the region.

Industry Relations

- Continue to offer educational opportunities to front line hospitality personnel through online newsletters, monthly event sheets and industry education tours.

Tourism Advocacy, Community Relations and Government Affairs

- Improve the Tourism Bureau's awareness in the community, showing citizens of Snohomish County that the organization is sensitive to community issues while being a proponent of planned tourism management and development.
- Promote the destination brand and encourage integration among and between communities and tourism attractions and services.
- Build stronger relationships with city and county elected officials and staff, ensuring shared understanding and support of the goals and missions of each.

Snohomish County Sports Commission and Board of Directors

The Sports Marketing Department of the Snohomish County Tourism Bureau is branded as the Snohomish County Sports Commission. The Sports Commission works to enhance Snohomish County's economy, image as a premier sports destination, and way of life for its residents by attracting diverse regional, national and international athletic events, assisting existing athletic events, supporting development of new athletic events and facilities, and marketing recreational and leisure activities to athletic event organizers and participants.

Board of Directors

The 2017 Snohomish County Sports Commission Board of Directors includes:

Jim Ballew (Chair), City of Marysville Parks & Recreation
Brian Davern (Secretary), Mill Creek Parks & Recreation
Beverly Meehan (Treasurer), Hilton Garden Inn Mukilteo
Jennifer Caveny, Holiday Inn Express
Chris Dietrich, I9 Sports
Greg Erickson, Marysville School District
Joel Faber, City of Lynnwood
Frank Foster (Ex Officio), Navigation Real Estate
Shannon O'Kelley, Integrated Rehabilitation Group
John Olson, Everett Community College
Robert Polk, Everett Public Schools
Tom Teigen, Snohomish County Parks, Recreation and Tourism
Kim Wilson (Past Chair), Retired, Northwest Interscholastic Activities Association

Snohomish County Lodging Tax Advisory Committee (LTAC)

RCW 67.28.1817 requires that Snohomish County, as a jurisdiction with a population greater than 5,000, also establish a Lodging Tax Advisory Committee (LTAC) to impose or make changes to the rate or use of the lodging tax.

Function

The Lodging Tax Advisory Committee is charged with making recommendation for the use of the following funds:

Small Fund (S.C.C. 4.40 - Imposed in Snohomish County - November, 1979 a 2% overnight lodging tax)

- Cities may choose to impose and administer their own overnight lodging tax
- Collects approximately \$500k per year
- Grant opportunity opens annually around September each year
- Available to market and promote events which draw tourists to stay overnight in the county
- Average request is approximately \$15,000
- Open to non-profits and municipalities
- Administration overhead cap is 12%

Large Fund (S.C.C. 4.41 - Imposed by Snohomish County - July, 1994 - Additional 2% tax on overnight lodging)

- Collects approximately \$2,500,000 per year
- Purpose of the fund is to pay, or secure the payment of, general obligation bonds or revenue bonds to develop strategies to expand tourism within the county and support comprehensive regional marketing for Snohomish County Tourism.
- The fund is currently supporting:
 - Funding the Snohomish County Tourism Bureau - Tourism Promotion - formed in 1996 as a result of the Strategic Tourism Plan at that time, and subsequently contracted in five year terms.
 - Everett Memorial Stadium - debt service through 2027
 - Lynnwood Convention Center - debt service through 2034
 - Strategic Tourism Plan and updates - staffing to support

Annual Grant Opportunity - Public Facility Districts - Approximately \$250k

- Available to fund large capital expenses for public facilities districts only (of which there are four) for the improvement of tourism related facilities as recommended to the County Council by the LTAC.

Administrative Overhead Cap 4%

The Committee

The statute requires that the LTAC consist of at least five members appointed by the county, two of whom must be representatives of businesses required to collect the tax and two of whom must be involved in activities authorized to be funded by the tax. If the county's LTAC consists of more than five members, the number of members from each of those two groups must remain equal to one another. The final member must be an elected official of the county, and this member will serve as Committee Chair. Membership will be reviewed and changed

as necessary on an annual basis by the appointing authority. The LTAC may also include one non- voting member who is an elected official of a city or town in the county.

Snohomish County's LTAC currently consists of the following members:

- One County Councilmember (serving as Chair)
- Two lodging industry representatives
- Two tourism industry representatives
- The Snohomish County Tourism Board Director (non-voting ex- officio member)

The LTAC was established to review and make recommendations on grant applications for funding from Snohomish County Lodging Taxes. Advisory committee member recommendations are submitted to the county Council for final funding approval. These projects promote tourism and job growth in Snohomish County.

The LTAC meets once per year with additional meetings convened as needed. A meeting is held in the fourth quarter of the year to assess the annual Hotel/Motel Small Grant Fund applications and requires committee members to review the applications prior to the meeting. Membership is reviewed annually to ensure appropriate representation.

Snohomish County Tourism Promotion Area (TPA) and Board of Directors

The Snohomish County Tourism Promotion Area (TPA) was established in March 15, 2011, and is codified in Chapter 4.118 SCC. Chapter 4.118 SCC establishes a nightly fee of \$1.00 per room night within the city limits of the City of Arlington, the Snohomish County portion of the City of Bothell, the City of Edmonds, the City of Everett, the City of Lynnwood, the City of Marysville, the City of Monroe, the City of Mountlake Terrace, and the City of Mukilteo and the unincorporated area of Snohomish County.

The purpose of the TPA is to promote tourism, welcome tourists and increase overnight stays and economic development in Snohomish County.

The Tourism Promotion Area fund enhances the resources available for tourism promotion within the county, including activities and expenditures designed to increase tourism and convention business. Top markets served by the TPA have historically been sports and outdoor recreation related. 75% of programs funded are athletic events due to the overnight impact of that market as a result of the sports sales program of the Snohomish County Tourism Bureau (SCTB). The TPA also funds the operational, marketing and sales function of the sports sales department of the SCTB.

Grants are executed by Rolling Applications with a once monthly deadline. The average request is approximately \$15,000. Administrative Overhead Cap is 9%.

TPA fund eligible expenditures are further outlined in the Tourism Promotion Area Financial Policy Statement 0001.

Additional considerations of the TPA fund include:

- The improvement and development of tourism attractions
- Allowing for tourism marketing in new markets
- Increase advertising and trade show attendance and other marketing promotions

Assessment revenue from the Tourism Promotion Area (TPA) generates approximately \$1.2 million annually for projects that drive overnight stays and economic development in Snohomish County.

Grant Program Management

County staff coordinates the ongoing grant program to assist with the established goals and mission of Snohomish County's TPA.

- Manage solicitations, mailings, responses, applicant questions etc.
- Coordinate project submission through County Executive and Council
- Develop contracts for approved projects
- Review contractor performance / ensure contract compliance
- Review billings and deliverables
- Approve and process payment
- Verify receipt and deposit of TPA revenue and interest earnings

- Provide revenue tracking and projections
- Report on project outcome
- Maintain website presence

Total 2017 TPA Funds Available for Projects in Business Plan: \$1,210,996 with \$700,000 set aside for contingencies.

TPA Marketing and Development

County staff promote and expand the visibility of the TPA fund within established tourism promotion efforts and highlighting Snohomish County's unique assets and tourist draws through online presence, marketing and promotions of the TPA assets, and in collaboration with vendors and groups.

May leverage and maintain web presence by:

- Curating ongoing blog articles that tell the story of the events/projects the TPA has funded and their impact
- Send press releases reporting on TPA projects
- Continue to develop website and online presence
- Place advertisements if needed in select, yet to be determined, media outlets

Collaboration with existing tourism promotion entities to promote the TPA:

- County and City LTAC's
- Snohomish County Tourism Bureau and Sports Marketing
- Snohomish County Lodging Association
- Mountain Loop Tourism Bureau
- Washington Tourism Alliance Summit

Coordinate as needed educational meetings to promote TPA awareness along with application criteria and submission guidance to local communities, cities and event venue locations.



Board of Directors

The Tourism Promotion Area (TPA) Board was created to serve in an advisory capacity to make use of lodging charges collected under Chapter 4.118 SCC. The TPA Board helps decide where and how the money is spent. The TPA Board is composed of fourteen members (five District Lodging, four At-Large Lodging, and five District Non-lodging). Board members serve three-year terms, staggered. The 2017 TPA Board of Directors includes:

Jennifer Caveny (Dist 1 Lodging)
 Vacant (Dist 2 Lodging)
 Georgia Borg-Leon (Dist 3 Lodging)
 Leeanne Brawner (Dist 4 Lodging)
 Vacant (Dist 5 Lodging)

Shawn Walker (At-Large Lodging)
 Jay Ohm (At-Large Lodging)
 Andrew Heelas (At-Large Lodging)
 Vacant (At-Large Lodging)

Jim Ballew (Dist 1 Non-Hotel)
 Dale Gellner (Dist 2 Non-Hotel)
 Rachel Flores (Dist 3 Non-Hotel)
 Vacant (Dist 4 Non-Hotel)
 Debbie Emge (Dist 5 Non-Hotel)

Bridgid Smith (Staff Support)
 Carol Peterson (Staff Support)

Tourism Funding and Revenue Flows

There are two funding mechanisms that Snohomish County currently uses to support and promote its tourism industry:

1. **Lodging Tax.** Under Washington State law, the lodging tax can be levied by counties or cities. The 2000 Snohomish County Strategic Plan for Tourism Development and Marketing established the development of significant new tourism attractions through capital investment as a strategic priority. To provide the financing for these investments in the county's tourism infrastructure, a countywide Public Facilities District (PFD) was created and partnerships with city level PFDs were developed.
2. **Tourism Promotion Area.** A Tourism Promotion Area (TPA) is an established geographic boundary, within which lodging establishments can self-impose an additional nightly fee on each room-night. TPA assessment revenues can be used to fund tourism promotion and development activities. The lodging industry in Snohomish County proposed implementation of a TPA, which was adopted by Council in 2011.

The revenue sources, purposes, and uses of these two tourism funding mechanisms are described in more detail in the following sections.

Lodging Tax

The lodging tax fund is a dedicated fund authorized by state and county statute that taxes hotel and motel overnight stays and uses the receipts for the purpose of developing and promoting tourism in Snohomish County.

Source of Funds

Snohomish County currently levies and collects the legal maximum lodging tax. The lodging tax fund has two sources, both based on taxes levied on lodging fees:

1. **The Small Fund.** The Small Fund is supported by a 2% credit on sales tax collected at lodging facilities. This fund is also known as the "Hotel-Motel Tax Fund" or "The First Two Percent." For the purposes of this document, it will be referred to as The Small Fund.
2. **The Large Fund.** This fund is supported by an additional 2% tax levied on the sale of lodging that accrues directly to the county. This fund is also known as the "Regional Tourism Tax Fund" or "The Second Two Percent." For the purposes of this document, it will be referred to as The Large Fund.

The county does not receive revenues from the sale of lodging that takes place in tribally-owned lodging on tribal land. A current issue nationwide is the collection of lodging tax revenues from online bookings. The county is receiving tax revenues from the sale of lodging through online travel websites, though some of this may be based on wholesale rather than retail costs.

The Small Fund

The Small Fund revenues come from a special excise tax authorized by RCW 67.28.180 and RCW 67.28.1801, and enacted by Snohomish County Code (SCC) 4.40.010. These statutes allow Snohomish County to levy and collect a special excise tax not to exceed 2% on the sale of lodging within county boundaries that is subject to

sales tax. The revenues are given to the county as a credit against the state sales tax on each eligible lodging sale. Snohomish County levies the maximum allowable 2%, meaning the county earns \$0.02 for each \$1.00 paid for eligible lodging. The county receives its allocations from the state on a monthly basis.

Money in The Small Fund that has not yet been withdrawn may be invested by Snohomish County in interest-bearing securities, with earnings returned to the Fund.

This revenue source is called The Small Fund because the county does not receive the revenues if the lodging sale takes place within a city that already levies this excise tax. Snohomish County does not receive this revenue from lodging sales in the following cities that levy this tax:

- City of Arlington
- City of Bothell
- City of Edmonds
- City of Everett
- City of Lynnwood
- City of Marysville
- City of Monroe
- City of Mountlake Terrace
- City of Mukilteo
- City of Snohomish

The Large Fund

The Large Fund revenues come from an excise tax authorized by RCW 67.28.181 and enacted by SCC 4.41.010. These statutes allow the county to levy and collect an excise tax not to exceed 2% on the sale of lodging within county boundaries that is subject to sales tax. This tax is in addition to other taxes levied on lodging fees, and accrues to the county regardless of the jurisdiction in which the lodging sale takes place. Snohomish County levies the maximum allowable 2%, meaning the county earns \$0.02 for each \$1.00 paid for eligible lodging.

Money in The Large Fund that has not yet been withdrawn may be invested by the county in interest-bearing securities, with earnings returned to the Fund.

Fund Administration

State and county statutes require Snohomish County to create a dedicated fund to receive lodging tax revenues, and that the revenues are expended only on eligible activities as described in the following section. The county Executive is responsible for administering both The Large Fund and The Small Fund, and for appointing a fund manager for each.

RCW 67.28.1817 requires that Snohomish County, as a jurisdiction with a population greater than 5,000, also establish a Lodging Tax Advisory Committee (LTAC) to impose or make changes to the rate or use of the lodging tax. The LTAC is described above.

Allowed Uses of Lodging Tax Funds

Use of The Large Fund and The Small Fund is regulated by RCW 67.28.1815 and RCW 67.28.1816.

RCW 67.28.1815 states that the revenues must be used for the purpose of paying costs of tourism promotion, acquisition of tourism-related facilities, or operation of tourism-related facilities. They may also be used to fund a multi-jurisdictional tourism-related facility.

RCW 67.28.1816 allows revenues to be used for the following additional purposes:

- The marketing and operations of special events and festivals.
- The operations and capital expenditures of tourism-related facilities owned by, municipalities, or public facilities districts created under RCW Chapters 35.57 and 36.100.

The Small Fund

The Small Fund is additionally regulated by SCC 4.40.050, which says The Small Fund revenues may be used for the following purposes:

- Acquisition, construction, improvement, or operation of convention center facilities, stadium facilities, or performance and/or visual arts center facilities.
- Payment of general obligation or revenue bonds used for the above purposes.

- Advertising, publicizing, or distributing information for the purpose of attracting visitors and encouraging tourist expansion. This can include promotional materials, development of strategic tourism plans, and other such uses.

SCC 4.40.060 encourages the fund administrator to define eligibility of sponsors and projects broadly to encourage wide participation and innovative proposals.

The Large Fund

The Large Fund is additionally regulated by SCC 4.41.030, which says the funds may be used for:

- Acquiring or operating, either jointly or individually, tourism-related facilities.
- To pay or secure general obligation or revenue bonds issued for the purposes referenced above.
- To develop strategies to expand tourism within the county.
- To support comprehensive regional marketing for Snohomish County tourism.

Use of Lodging Tax Funds

The Small Fund

All dollars in The Small Fund not used for fund administration (capped at 12% of annual appropriations) are distributed through a competitive award process. Although The Small Fund can be used for many different purposes, in practice, The Small Fund has primarily been used in Snohomish County to support local tourism promotion initiatives throughout the county including brochures and advertising. These promotional initiatives are often a small piece of a larger project, such as an event or festival that needs marketing support.

Use of The Small Fund dollars for marketing purposes has traditionally been allowed for advertising and promotional campaigns in communities more than 50 miles away from the site of the attraction. The intention of this requirement has been to draw visitors more likely to stay overnight in the county's hotels and motels, which is desirable both for the additional spending overnight visitors bring, and because these visits directly contribute to the Lodging Tax fund, to some degree replenishing the dollars that were expended in the marketing effort. Attracting overnight visitors is not currently a requirement of either state or county law, but it is a criterion that is considered in application evaluation. Although it is not an eligibility requirement, it is part of the bonus selection criteria of The Small Fund application process (see Exhibit 11).

If not all of The Small Fund revenues are spent in a given year, the excess funds accumulate. The current fund reserve is approximately \$800,000. In recent years, awards have exceeded revenues, drawing the reserve down from a high of just over \$1 million in 2013. The LTAC has established a minimum fund balance of \$500,000 and expressed an intention to fund qualifying applications as long as the fund balance remains above this target.

The Large Fund

The Large Fund has emerged as a resource for projects of countywide benefit, with a strong emphasis on funding capital facilities, which was a primary strategy of the 2000 Strategic Plan for Tourism Development and Marketing. In addition to assisting with the acquisition and construction of several regional tourism facilities (often in partnership with the Snohomish County PFD or a city-level PFD), The Large Fund revenues have also been dedicated to supporting an integrated program of local, regional, national, and international tourism promotion through the Snohomish County Tourism Bureau.

The Fund was created in 1994 by the Snohomish County Council to support large tourism-related development projects of regional significance. The intent at the time was to allocate the funds evenly for three purposes:

- Snohomish County Tourism Bureau
- Everett's Memorial Stadium Improvements
- A regional tourism project in South County

By the early 2000s, the Large Fund had accumulated a substantial reserve. To distribute these funds, the LTAC worked with county stakeholders to develop a strategy and program guidelines that aligned with the Goals of the 2000 Strategic Plan for Tourism Development and Marketing, culminating in a competitive funding process that awarded long-term funding to the Memorial Stadium in Everett and the Lynnwood Convention Center (in South County), via the Lynnwood PFD.

Currently, the fund is being distributed as follows.

Contracting with the Snohomish County Tourism Bureau

The Large Fund distribution to the Snohomish County Tourism Bureau is set through contract. This distribution is used to support the administration and operation of the Bureau, and to fund the Bureau's selected marketing and promotion campaigns, including projects such as advertising, website operation, and brochure development, direct sales efforts in the sports and convention / events markets, media relations, visitor services and industry education.

Assisting with the acquisition and construction of regional tourism facilities

Remaining Large Fund revenues are used to support regional tourism facilities:

South County Share. A portion of The Large Fund revenue is reserved for the South County area. Currently, this money is distributed to the Lynnwood PFD, which uses it to support the Lynnwood Convention Center. The Lynnwood PFD receives distributions according to a formula set in an inter-local agreement, up to a maximum of one-third of Large Fund revenues. In years where the scheduled amount is below the one-third maximum, the difference is put into a reserve fund. The Lynnwood PFD also receives funds from the Snohomish County PFD and from city lodging taxes.

Everett Share. This money is dedicated to paying off the bonds used to fund Everett's Memorial Stadium. This appropriation pays the debt service on the bonds, and also contributes to the required bond reserve, which will help pay the debt service when revenues are insufficient. The City of Everett receives the larger of the following amounts each year from The Large Fund:

- An amount sufficient to pay for the Everett Memorial Stadium bond and its required reserve; or
- An amount equal to the percentage of Large Fund revenues collected within the City of Everett, multiplied by net Large Fund revenues (including interest earned and less administrative costs).

In years where the bond service amounts exceed the formulaic distribution amount, the county has made intra-fund transfers to the City of Everett sufficient to service the bonds. All such intra-fund transfers are tracked, and reverse transfers to pay back these “loans” are made in later years when revenues are sufficient.

Current Balance and Commitments

The Large Fund currently has a surplus of approximately \$3.5 million. A defined surplus has been approved by LTAC.

A portion of future revenues are committed to paying the debt service on the bonds identified above. Future funds are also committed to the Lynnwood PFD, according to the formula in the inter-local agreement.

Award Process and Criteria

The Small Fund

The Small Fund revenues are distributed through a competitive award process. In recent years, the county has sponsored one application period each year, during which eligible entities (nonprofit organizations, public, or public-private entities) submit proposals for project assistance. Applications must include descriptions of eligibility, scope of work, project timeline, letters of recommendation, estimated budget, available matching share, and an explanation of cooperative commitments.

The LTAC is responsible for reviewing applications and submitting recommendations for funding to the County Council, which makes the final project allocation decisions. Winning projects are then contracted for on a reimbursement basis. The LTAC first screens projects for eligibility and then uses selection criteria to rank eligible projects for recommendation to the Council.

The Large Fund

Snohomish County Tourism Bureau Programs

All tourism-related activities undertaken by the Bureau are funded and scoped through a contract with the county, approved and signed by the County Executive. The previous contract covered a one-year period from January 1, 2011 to December 31, 2015. Currently, 2016 and 2017 are one-year contracts. The budget and operational plan for each year are included as attachments to the contract, and are updated on an annual basis.

The operational plan describes the actions that the Bureau will take during that year to achieve its goals, and the budget gives a more detailed cost estimate of each piece of the operational plan. The operational plan and the budget are split into supporting Visitor Services and Non-Visitor Services, with dollar amounts designated for each.

Separately - Funded Capital Projects

The County Executive and the County Council must both approve the dedication of funds to any other capital projects. Of the current capital projects that are being supported (Memorial Stadium, and Lynnwood Convention Center), Xfinity Arena and Lynnwood Convention Center were chosen through a competitive application process in the early 2000s. The projects did not compete against each other, as money was designated separately for each of the geographic areas. For that competitive process, Snohomish County put together a Large Fund

Program Guidelines and Application document that laid out the purpose of the fund, minimum eligibility criteria, and selection criteria.

Minimum eligibility criteria included:

- Projects must be consistent with RCW and the county's allocation strategy.
- The applicant and partners must make a substantial financial commitment to the proposed project.
- County funds will ordinarily not amount to any more than 30% of the total project cost, including debt service.
- Projects must demonstrate adequate feasibility through market and financial analyses.
- Projects demonstrate the capacity to be under construction within 24 months of approval.
- Project applicants must demonstrate they have control of the sites of their projects.
- County funds will be used for construction and "due diligence" project development costs, not operation and maintenance.

If a project met all of the above eligibility requirements, it was then scored according to the selection criteria. Qualifying applications were reviewed by a technical review panel that made funding recommendations to the LTAC. The LTAC then prepared their own comments on the proposals, before forwarding the recommendations to the County Council for final decision on project approvals and funding levels.

The Opportunity Fund

In addition to the regular distributions and grant cycles of The Large and Small Funds, the county offers funding through the Opportunity Fund. This money from the Small Fund, is made available outside of the regular grant cycle to take advantage of extraordinary tourism promotion opportunities that don't align with normal application periods.

Requirements to access the fund are more rigorous than the other grant cycles, preventing the Opportunity Fund from becoming a way for organizations to circumvent the normal application process.

Tourism Promotion Area Fund

A Tourism Promotion Area (TPA) is an established geographic boundary, within which lodging establishments can choose to assess, as a group, an additional fee on each room-night of lodging they sell. TPA assessment revenues may be used to fund tourism promotion and development activities.

The lodging business community proposed the details of the TPA in an initiation petition presented to the county Council. This petition was signed by the operators in the proposed area that would pay 60% or more of the proposed charges, as required by law. The County Council passed a resolution stating their intent to support the effort. Snohomish County established a TPA in 2011.

The TPA has the following characteristics:

- The TPA encompasses the Cities of Arlington, Bothell, Everett, Edmonds, Lynnwood, Marysville, Monroe, Mountlake Terrace, and Mukilteo as well as unincorporated areas of Snohomish County. The Cities joined the TPA through an inter-local agreement.
- The assessment imposed on the operators of lodging businesses in those areas is \$1.00 per room-night (half of the legal maximum of \$2.00 per room-night as stated in RCW 35.101.050), resulting in annual revenues just over \$1.1 million in 2016.
- The assessment is imposed on operators of lodging businesses with properties having 50 or more rooms.

All future lodging establishments in the area that fit the criteria must also participate in the TPA. Tulalip Tribes and any lodging establishments tribally-owned and located on the Tulalip reservation are not required to participate.

Source of Funds

TPA revenues come from a dollar amount assessment on each room-night of lodging purchased in a defined geographic area. This adds a set amount to each night of lodging purchased by a customer, and this amount accrues to the TPA fund.

Fund Administration

All TPA revenues are deposited into a dedicated fund, used only to support tourism. RCW 35.101.030 gives the County Council final authority about how to use the money to promote tourism after they consider the recommendations of the TPA Board. It also gives the Council authority to create an advisory board for the purpose of fund distribution. The Snohomish County Code Chapter 4.118 further outlines the TPA, as well as fund administration and use.

The Snohomish County TPA Board has 14 members, nine lodging members (one from each of the five county council districts and four at-large) and five non-lodging members. Board members serve three-year terms and collectively make funding recommendations to the Council. The Snohomish County Lodging Association industry group devised the election/appointment process, as well as the composition and bylaws for the Board. General guidelines from the Snohomish County Lodging Association Executive Board were that the Board should represent all areas and lodging types, and that members be nominated by the lodging community. This lodging

community will also have the discretion to halt the assessment through a vote, if the industry isn't satisfied with how the account is being administered.

Allowed Uses of TPA Funds

Use of these funds is regulated by RCW 35.101, which authorizes the establishment of a TPA and permits the levy of special assessments to fund tourism promotion. The RCW defines eligible tourism promotion costs as "activities and expenditures designed to increase tourism and convention business, including but not limited to advertising, publicizing, or otherwise distributing information for the purpose of attracting and welcoming tourists, and operating tourism destination marketing organizations." Use of these funds is also regulated by statutes passed by the Snohomish County Council.

Use of TPA Funds

The TPA states that revenues may be used for the following purposes:

- The general promotion of tourism within Snohomish County as specified in the TPA business plan to be adopted annually.
- The marketing of convention and trade shows that benefit local tourism and the lodging business in the TPA.
- The marketing of Snohomish County in the travel industry in order to benefit local tourism and the lodging businesses in the TPA.
- The marketing of Snohomish County to recruit sporting events in order to benefit local tourism and the lodging businesses in the TPA.

Under these criteria, the Snohomish County Sports Commission (which is under the Snohomish County Tourism Bureau), and arts, culture, festivals, and sports organizations that bring an actual return on investment in overnight hotel stays as a result of their marketing efforts are eligible to compete for the funds. Personnel or administrative costs are generally not funded by the TPA grant, the sports division of the Snohomish County Tourism Bureau (Sports Commission) excepted.

Award Process and Criteria

TPA assessment funds are accessed by eligible organizations through an application process. The TPA Board reviews applications and makes recommendations to the Council for funding based on defined criteria.

The Snohomish County Sports Commission adhere to the same rules as other applications for the funds, and submit applications with detailed uses of the requested funds before receiving any grants.

Public Facilities District Fund

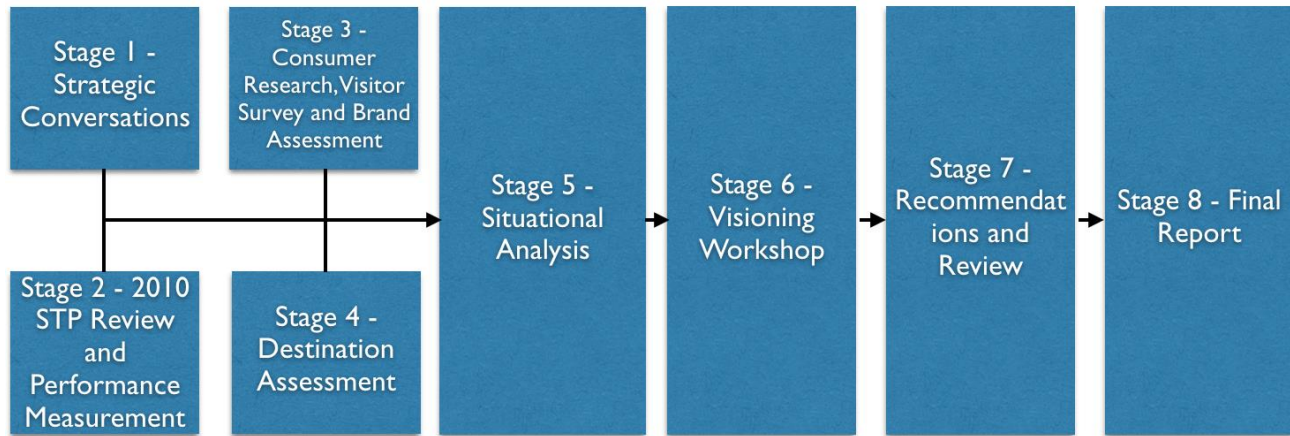
In addition to The Large Fund dollars, many of Snohomish County's tourism and entertainment venues have benefited from Public Facilities District (PFD) funding, either from the County PFD or from a city-specific PFD, or from both. The following table summarizes the PFDs in Snohomish County, noting both the countywide PFD and city-specific PFDs.



Public Facilities District	Funded Facilities
Snohomish County Public Facilities	Xfinity Arena Edmonds Center for the Arts Future of Flight Aviation Center Lynnwood Convention Center County Parking Garage
Edmonds Public Facilities District	Edmonds Center for the Arts
Everett Public Facilities District	Xfinity Arena
Lynnwood Public Facilities District	Lynnwood Convention Center

Strategic Tourism Plan Process

There are eight Stages of work associated with updating the Snohomish County Strategic Tourism Plan. Details of the activities and results from each Stage follow below.



Stage 1 - Strategic Conversations

Over the course of three days (Oct 19-21, 2016), Resonance Consultants Chris Fair and Richard Cutting-Miller met individually and in group sessions with approximately 50 stakeholders of the Snohomish County Travel & Tourism industry. Resonance also produced an online survey from Nov 11-18 for 43 stakeholders.

The primary purpose of these discussions and the survey was to identify high-level issues and opportunities critical to the success of the Strategic Tourism Plan project and to build an informal group of “champions”, which will be critical to the endorsement and implementation of the strategy upon completion.

The discussions lasted between 45 and 75 minutes each and tended to focus on:

1. Analyzing current market conditions and identify appropriate opportunities and targets for improvement.
2. Reviewing the current Strategic Tourism Plan and identifying significant results and any outstanding initiatives that should be continued.
3. Identifying any emerging / new opportunities as they relate to areas of marketing, product development and infrastructure development.
4. Assessing the current brand and effectiveness of brand collateral.

The results of these discussions were recorded and summarized by Resonance to help identify, innovate, create and articulate unique products, amenities, programming and experiences – along with the policies and protocols required – to guide the long-term planning and design of Snohomish County as an important tourism destination. This feedback was then grouped together into Strengths, Weaknesses, Opportunities and Threats (SWOT Analysis below for details).

Details of the results for Stage 1 - Strategic Conversations can be found in the Snohomish County Tourism Strategic Plan Stakeholder Engagement Report dated November 21, 2016.

Stage 2 - 2010 STP Review and Performance Measurement

The 2010 Snohomish County Tourism Strategic Plan was designed as a roadmap to guide development of the county's tourism industry and assets to reach its full potential. The plan outlined a course of action for five years from 2010 to 2015. This Stage 2 activity presented a review of the 2010 Plan to evaluate how well it has served the county in meeting its tourism goals and helped inform the strategic direction of this 2018-2022 Plan update.

Methodology

The review of the 2010 Snohomish County Tourism Strategic Plan was based on qualitative and quantitative information from staff at Snohomish County and the Snohomish County Tourism Bureau who have been leading plan implementation. Methodologies for the plan review included several in-person meetings with key staff from these two organizations, reviewing documents and plan implementation update reports, and analyzing expenditure data provided by staff.

Goals, Strategies, and Tasks

The 2010 Plan contained six Goals and 26 Strategies that further articulate the strategic approach. Each strategy contains a number of detailed tasks with lead organizations assigned, suggested timelines for completion, and estimated resources needed to complete the task.

2010 Plan: Overview of Goals and Strategies

Overview of Goals and Strategies
I. Stronger Tourism Brand and Marketing Strategy
1. Repackage the County's brand into an accessible adventure destination.
2. Develop strong cross-promotional marketing to encourage visitors to experience anchor clusters, anchor attractions, sustaining clusters, and sustaining assets.
3. Develop the capacity to better promote hidden assets.
4. Have fun and engage people in surprising ways.
II. Anchor Clusters and Anchor Attractions Focus with Strong Cross-Promotional Efforts
5. Expand the convention and meeting booking function of the Snohomish County Tourism Bureau.
6. Strengthen the aviation cluster and knit it to the broader network of tourism assets.
7. Build on the County's strengths in tribal gaming.
8. Leverage the County's considerable outdoor recreation assets.
9. Promote and support the County's diverse shopping options.
10. Continue to build the County's organized sports market.
11. Promote adventure-focused day trip itineraries, maps, packages, and promotions.
12. Promote all itineraries, maps, packages, and promotions within target audience communities.
III. Rich Network of Sustaining Clusters and Sustaining Assets
13. Take a collaborative approach to strengthening the County's sustaining tourism clusters.
14. Identify sustainable tourism opportunities.
IV. Stronger County Tourism Infrastructure
15. Improve the tourism information delivery system.
16. Update the approach to putting information in visitors' hands.
17. Improve wayfinding and support the serendipity of discovery.
18. Improve public transportation options to enhance access to tourism assets.
19. Support the broadening of the County's range of overnight options.
V. Enhanced Organizational Capacity
20. Strengthen the County's ability to coordinate tourism efforts and implement the Plan.
21. Use data to strengthen tourism promotion and development efforts.
22. Broaden and enrich the conversation between the County and stakeholders.
23. Build stronger partnerships with the tribes and encourage indigenous tourism experiences.
24. Support professional development for the County's tourism workforce.
VI. Tourism Funding Resources Align with Strategic Goals
25. Leverage the lodging tax effectively to advance tourism strategies.
26. Support the emerging Tourism Promotion Area.

Source: Snohomish County Tourism Plan, 2010.

Big Picture Summary Review

The following provides a high-level overview of what these staff members thought were the plan's strengths, weaknesses, and opportunities for improvement.

Strengths

- **Variety and specificity.** Staff appreciated the breadth of the plan and the variety of tourism assets addressed. The specificity of the plan at the strategy and task level gave county staff and the County Council the ability to approve proposed work when it was within the estimated resource expense numbers that the plan indicated was needed to complete it.
- **Including and elevating hidden assets.** Staff liked the strategic approach that called for including and elevating development of hidden assets and connecting them with to anchor clusters and attractions.
- **Supporting data.** The plan provided the data to support actions to move work forward, and it provided guidance and protection to decline other suggestions, as suggested tasks and strategies were already carefully considered to support the plan's goals and strategic approach.
- **Engagement focus.** The engagement component was also seen as highly valuable, with some participants stating the most valuable aspect of the 2010 Plan was that it required members of the county's different tourism sectors and geographies to work together. The plan provided opportunities for small town communities to join the conversation on tourism development through authorized workshops and trainings outlined in the plan's strategies and tasks (see Strategies 13, 22, 23).

Weaknesses

- **Too specific and inflexible.** While the specificity of the plan was helpful in some instances, it was problematic in others. The specific timeline outlined in the plan created inflexibility among decision-makers that took the plan verbatim and not as a structural framework. Some decision-makers felt if they did not follow the plan exactly as written, they would be held accountable.
- **Lack of narrative cohesion.** Staff members felt that the plan lacked a cohesive narrative voice, and that there was inconsistent direction, where some strategies conflicted with others.
- **Not user-friendly.** Staff thought the plan was difficult to report on because it was implemented by two different agencies with different focuses, and that it was not easily accessible or understandable to a broader audience.

Opportunities for Improvement

- **Provide more flexibility through a framework.** Staff suggested that the plan update could provide more flexibility through general recommendations with language that it is suggested, but not mandatory. This could also be accomplished by providing a more general framework and less detail in the Goal-Strategy-Task organization employed in the 2010 Plan.
- **Improve Tourism Exploration Zones.** There were some thoughts on improving the Tourism Exploration Zones to break them into regions or potentially overlapping corridors, or based on interests.

Details of the results for Stage 2 - 2010 STP Review and Performance Measurement can be found in the Snohomish County Tourism Strategic Plan 2010 STP Performance Measurement Report dated February 6, 2017.

Stage 3 - Consumer Research, Visitor Survey and Brand Assessment

Stage 3 of the 2018-2013 STP update included a(n):

- Overview of consumer research for tourism nationally, in Washington State and in Snohomish County.
- Assessment of the current brand, Open Up, and determination of the effectiveness of brand collateral.
- Snohomish County visitor survey assessing levels of satisfaction and detailing a market segmentation analysis to profile the characteristics of the Snohomish County visitor.

Consumer Research

U.S. Travel & Tourism is strong and has enjoyed a period of healthy growth post-Great Recession (starting in 2010), and direct spending by resident and international travelers in the U.S. averaged \$2.6 billion a day, \$108.1 million an hour, \$1.8 million a minute and \$30,033 a second.

U.S. Travel Association reported that U.S. Travel and Tourism makes a significant and growing contribution to the U.S. economy:

- \$2.1 trillion: Economic output generated by domestic and international visitors (includes \$947.1 billion in direct travel expenditures that spurred an additional \$1.2 trillion in other industries).
- 15.1 million: Jobs supported by travel expenditures (includes 8.1 million directly in the travel industry and 7.0 million in other industries).
- 231.6 billion: Wages shared by American workers directly employed by travel.
- 147.9 billion: Tax revenue generated by travel spending for federal, state and local governments.
- 2.7%: Percentage of nation's gross domestic product (GDP) attributed to travel and tourism.
- One out of nine: U.S. jobs that depend on travel and tourism.
- No. 7: Where travel ranks in terms of employment compared to other major private industry sectors
- 84%: Percentage of travel companies that are considered small businesses (2012).
 - Billion: number of person-trips* that Americans took for business and leisure purposes
- 77.5 million: Number of international arrivals in the U.S. in 2015, including 38.4 million from overseas markets.
- Top 10: Travel is among the 10 industries in 49 states and D.C. in terms of employment.

U.S. Travel Association also reported that leisure travel is the largest component of U.S. Travel and Tourism:

- Direct spending on leisure travel by domestic and international travelers totaled \$650.8 billion in 2015.
- Spending on leisure travel generated \$99.6 billion in tax revenue.
- Nearly four out of five domestic trips taken are for leisure purposes (79%).
- U.S. residents logged 1.7 billion person-trips* for leisure purposes in 2015.
- Top leisure travel activities for U.S. domestic travelers: (1) visiting relatives; (2) shopping; (3) visiting friends; (4) fine dining; and (5) beaches.

U.S. Travel Association reported that business travel is a lucrative component of U.S. Travel and Tourism:

- Direct spending on business travel by domestic and international travelers, including expenditures on meetings, events and incentive programs (ME&I), totaled \$296.3 billion in 2015.
- ME&I travel accounted for \$121.9 billion of all business travel spending.
- U.S. residents logged 459 million person-trips* for business purposes in 2015, with 37% for meetings and events.

U.S. Travel Association reports that international travel is an important and growing component of U.S. Travel and Tourism:

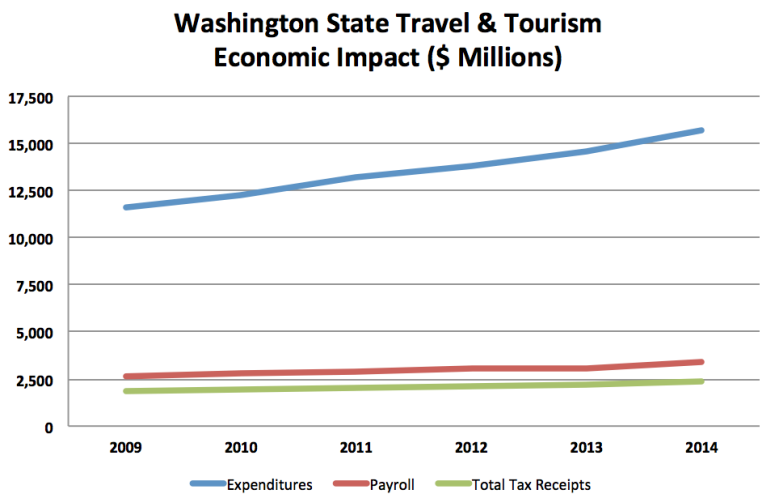
- In 2015, U.S. Travel Exports (includes general travel spending, international passenger fares, as well as international traveler spending on medical, educational and cross-border/ seasonal work-related activities) totaled \$246 billion. International Travel Imports totaled \$148 billion, creating a \$98 billion travel trade surplus.
- The U.S. received 77.5 million international arrivals in 2015. Of those, approximately 38.4 million came from overseas markets, and 39.1 million came from Canada and Mexico.
- The United States' share of total international arrivals is 6.5% (down from 7.5% in 2000).
- International travel spending directly supported about 1.1 million U.S. jobs and \$28.4 billion in wages in 2015.
- Each overseas traveler spends approximately \$4,400 when they visit the U.S. and stays an average of 18 nights.
- Overseas arrivals represent 49.5% of all international arrivals, yet account for 80.5% of total international travel spending.
- Top leisure activities for overseas visitors: (1) shopping, (2) sightseeing; (3) fine dining; (4) national parks/monuments and (5) amusement/theme parks.

U.S. Travel Association also reports that:

- The U.S. lodging industry is healthy and growing.
- The U.S. air travel industry is healthy and growing.
- The U.S. ground travel industry is healthy and growing.
- U.S. Travel and Tourism is expected to grow at a slower rate in the near future.



For Washington State, U.S. Travel Association reports that Travel and Tourism is healthy and growing.



Source: US Travel Association



Source: US Travel Association

In Washington State, consumer research for hotel supply, occupancy, average daily rate and RevPAR shows:

Hotel Supply

- The hotel/motel room supply across the four county region (Snohomish, King, Pierce and Kitsap Counties) has increased every year for the last six years – the average annual increase is 196,874 rooms per year.
- Most of this growth between 2009 and 2015 (61% of all new rooms) has been in King County, while Snohomish County added 23% of all new rooms.
- Snohomish County grew its Room Supply on average 2.2% per year (2009-2015), while Kitsap grew 1.9% per year, Pierce County 1.1% per year and King County 1.0% per year.
- In 2015, Snohomish County rooms represented 12.3% of the total supply for the four county region.
- The room supply in Snohomish County grew by 14.1% from 2009 to 2015.

Occupancy

- In 2015, the occupancy rate in King County is higher than the State overall or any of the other counties in the four county region. Snohomish County has maintained second place ranking between 2009 and 2015.
- In 2015, the occupancy rate in Snohomish County fell by 1.6% following the first increase in room supply in three years. Room supply increased by 4.0% in 2014.

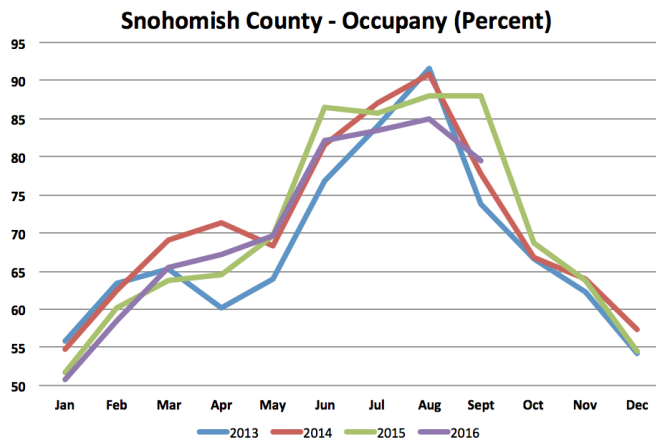
Average Daily Rate (ADR)

- The average daily rate for all hotels/motels in Snohomish County is lower than in King County and the State average, reflecting that Snohomish County lodging is a more “value” oriented hotel/motel market.
- Snohomish County’s average daily rate has measurably increased over Pierce and Kitsap Counties since 2011 and has maintained its premium for the past four years.
- Please note that Snohomish ADR increased in 2015 even though Occupancy slightly decreased.

Revenue per Available Room (RevPAR)

- Snohomish County RevPAR has increased six out of the last six years, with 2015 showing slightly weaker growth as a result of new room supply in 2014.
- Snohomish County RevPAR is closely following the Washington State average, falling well short of King County RevPAR and nicely exceeding Pierce and Kitsap County RevPAR after starting at the same level in 2009.

The consumer research also illustrated the Snohomish County hotel statistics by month. There is clearly a high season from June to September, shoulder seasons in May and October and an off-season from November to April.



The consumer research for Snohomish County also found:

- Relative to other counties in the region, Snohomish County tourism sectors grew slower after the recession and during the 2010 Plan period from 2010-2015. Although Snohomish County's tourism sector employment did not shrink as much as other counties in the region during the Recession, the other three counties have since recovered and surpassed their 2009 employment numbers. Snohomish has still not recovered its 2009 tourism-sector employment number of 14,545.
- Compared to the nation and the region, Snohomish County is strongest in the RV Parks sector.
- The Gaming sector, which was prominent in the 2009, is now about the same as the region and the nation in terms of the number of jobs and the rate of growth for the sector.
- Snohomish, Pierce, and Kitsap show a similar trend of per capita visitor spending the last 14 years. These counties attract fewer visitors from outside the county compared to King County.
- Snohomish has slightly more visitors per capita than Kitsap and Pierce.
- Total visitor spending in Snohomish County in 2014 was \$902 million in 2014 dollars.
- Overall, visitor spending has been increasing in Snohomish County since 2000.
- Visitors to Snohomish spend most on food and transportation/gas, which total nearly half of all visitor spending.
- Visitor spending by commodity categories in Snohomish is similar to Pierce and Kitsap. These three counties differ from King County, where air transportation and accommodations combined equal 42.7% of total visitor spending.

Details of the Consumer Research for Stage 3 can be found in the Snohomish County Tourism Strategic Plan Situational Analysis Report dated January 18, 2017.

Brand Assessment

As part of Stage 3, it was also important to review the current Snohomish County travel and tourism brand standing and its relevant applications in digital, social and print arenas to determine opportunities for positioning the brand and the region to meet the goals for the future.

To serve this purpose, Resonance undertook a Brand Assessment, which included a very limited, high-level review and analysis of marketing and communications channels and published / online material provided by Snohomish Tourism Bureau.

The full results from the Brand Assessment can be found in the Brand Review and Analysis Report (November 29, 2016).

Situation

As a result of the 2010 Snohomish Tourism Plan, investment was made into the development of a cohesive tourism brand for the region, branded as Open Up.

Formally rolled out in 2013, Open Up identified the target audience for the county tourism brand as “those wanting to explore and pursue, (extreme recreation, a great buy, a big casino win).” Indirect target audiences also included tourism partners, local businesses, residents, convention customers and more.

This brand has been successful in aligning messaging for the region and day-to-day implementation and improvements have been actioned across partners and regions. The Brand Assessment incorporated the following research:

- Review of online and printed materials provided by Snohomish County.
- Review of plans, strategies, brand documents and guidelines provided by Snohomish County including: Magazines, Email Newsletters & Blasts, Strategic Plan, Operating Plan, Brand Manual, Languages for Online Listings, Social Media Platforms, Logos, Typography, Typefaces, Brochures and Flyers.

The Brand Assessment helps to lay a framework for the Snohomish County Tourism Plan update and will form a basis for program and positioning recommendations and outlines:

- What works
- What doesn't and how it can be improved
- Gaps, areas of duplicated effort and potential opportunities
- Findings to effect Snohomish County's brand and marketing priorities

Findings

The Snohomish County brand and supporting collateral contains a wealth of information for visitors about the region. Notwithstanding, many of the brand and marketing assets explored during the review process showed scope for improvement. The following recommendations are given to better position the Open Up brand for success in the future:

1. Refresh Open Up Brand Platform
 - a. Refresh Open Up typeface, logo and graphic assets to be used in all marketing applications.
 - b. Refine messaging and application of brand pillars with clear positioning features that highlight the anchor attractions of Snohomish County.
 - c. Consider logo refresh and expansion with visual iconography to mark anchor attributes
 - d. Refresh Brand Style Guide accordingly outlining brand colors, font choices, text treatments, iconography, image-use guidelines and quality control and tone of voice.
2. Refresh and Refine Brand Messaging
 - a. Clarify naming and key messages for each brand pillar to be used consistently across brand applications of Snohomish County becomes known for these anchor pillars.
3. Refresh Open Up Digital and Design Assets Across Platforms
 - a. Develop Immersive Short Films: Given the importance of digital marketing and emotive film, it is recommended that a digital film strategy be created to better portray the beauty, attractions and intriguing story of the region.
 - b. Develop or Utilize Existing Alluring Photography Assets: New, original lifestyle photography, outdoor photography, event photography and anchor location photography for use across all relevant collateral.
4. Refresh and Expand Interactive Website
 - a. Expand Interactivity: We believe that the website has a far larger role to play than it does at the moment, and could easily be the portal for information for many stakeholder groups. We also acknowledge that some visitors will not utilize a web based service, so we recommend centralization

of available documentation through visitor bureaus, airports, partner venues, etc. Consider expanded Media Portal, Conference and Events Portal, Itinerary Portal, etc.

- b. Expand Travel and Transportation pages to integrate interactive resources such as Roadtrippers.com, or interactive local transportation maps via Google maps to improve functionality
- c. Develop second and third tier travel itinerary pages to be more easily accessible and searchable with immersive films, itineraries and images interactively embedded in the website.
- d. Improve User Experience: minimize page clicks to get to pertinent information, refresh design look, feel, usability, and navigation.

5. Develop International Visitor Content

- a. The Pacific Northwest is fast becoming a well frequented destination for international and Asian visitors. International visitors need access to translated website content, translators and dedicated international travel guides in their language of choice. Consider partnering with local international groups to co-produce visitor guides and digital content for key audiences in Japan, China, Korea, and European Countries. At minimum design refreshed website with multi-lingual options.

6. Create Multi-year Outdoor Adventure Campaign

- a. Capitalize on targeted messaging and itineraries for the “Where Seattle gets outside (escapes, gets outdoors, where Seattle meets the outdoors, go out socially, go out shopping, get outside of yourself)” messaging.

7. Expand Consistent Social Media Campaign Strategy and Implementation: utilizing new digital assets or alluring photography and emotive films
 - a. Content should be directed with brand standards on postings, photography and messaging.
 - b. Social user generated content should be encouraged through competitions, partner promotions, hashtag campaigns and live event social media integration.
8. Simplify Copy Content and Language across Platforms: making it simple and clear / aspirational yet reduce overall quantity of type content using active links, interactive digital tools such as maps, search functions etc.
9. Develop Digital Portal for Partners and Media: Centralize imagery, film and messaging resources and access through web based platform
 - a. Groups & Conventions: Could be expanded with an interactive convention planner tool, destination marketing toolkit, and more image and film content to draw planners into the possibilities of hosting their event in Snohomish County.
10. Strategy Application. Recommendations made in the 2013 Brand Roll Out included the partner buy in and supporting or integrating the county tourism branding into their messaging, “cross- promotional marketing to encourage visitors to experience anchor clusters, anchor attractions, sustaining clusters and sustaining assets.” The integration of the county brand with the partners was met with limited engagement. While some key attractions (Future of Flight Aviation Center, Imagine Children's Museum, Alderwood Mall, Paine Field, Holiday Inn Downtown Everett) and communities (Stanwood) integrated the brand elements including colors, vocabulary and messaging, it was met with resistance from other organizations who didn't want to blend their own brand with the county tourism brand elements.

We recommend revisiting these recommendations with a particular focus on giving partners the tools and strategies to support the Open Up brand in their endeavors.

Summary

Snohomish County clearly has a wealth of adventure, nature and diverse assets to offer and has come a long way since the implementation of the new Open Up brand in 2013.

The opportunities for the overarching brand identity of Snohomish County and the Open Up brand are many. It is recommended that a refreshed and repositioned brand look and feel and applications across the website, social media and print collateral move forward with a fresh focus on vivid imagery of the region, minimized copy content and immersive documentary and emotive narrative films. As seen in the table below, there is great value in the ad hoc, planned and executed brand assets to move toward optimization through the recommendations above. We believe the efficient and effective implementation of the above recommendations adapted for the new Strategic Tourism Plan will add great value to positioning Snohomish County and the Open Up brand to those “wanting to explore and pursue, (extreme recreation, a great buy, a big casino win)” as well as key secondary target audiences of conference planners, media and regional travelers in the years to come.

5. Optimized				
4. Evaluated				
3. Executed	X	X	X	X
2. Planned	X	X		X
1. Ad Hoc		X		X
0. Not Performed				
	Website	Social Media	Advertisements	Marketing Collateral

Notations are defined as follows:

1. Ad Hoc (implemented with varying degrees of planning, evaluation and results)
2. Planned (marketing platform planned or operational to some degree but is not fully executed across the board)
3. Executed (marketing platform operational, would benefit from further evaluation (possible new strategy, human resource or project budget allocation and optimization)
4. Evaluated (marketing platform operational, and evaluated with clear new strategy, human resource or project budget allocation noted)
5. Optimized (marketing platform operational, and operating at a high level of effectiveness in terms of market comparison, connection to brand platform and integration with other marketing tactics)

Visitor Survey

For many tourism destinations it's difficult to market to age groups on a generational basis because they're so big. More effective, then, is to identify psychographic segments, types of travelers who – regardless of age or gender – share similar travel, interest and spending patterns. By approaching marketing from a psychological profile, destinations can focus on types of marketing that appeal to these segments. These also help destinations determine which segment is the best match for their product.

Consumer research for this project included past visitor profiling and segmentation analysis utilizing Resonance's proprietary segmentation modeling tool building on a Resonance survey of over 4,000 active U.S. and Canadian travelers.

The segmentation analysis used is both a behavioral and attitudinal segmentation. Three main inputs are used in our segmentation modeling:

1. Most important factors taken into account when deciding on a vacation destination;
2. Activities enjoyed while on vacation; and
3. General attitudes towards vacations.

The resulting segmentation solution identifies five key segments of varying sizes with distinct behaviors and attitudes resulting in different demographic profiles and trip characteristics. Key segments of U.S. travelers in our modeling are:

- Sophisticated Explorers
- All-In Enthusiasts
- Active Adventurers
- Occasional Convenience Travelers
- Family-Oriented Frugals

To better understand who the current Snohomish County customer is, how they compare to U.S. travelers in general and what types of travelers might be attracted to the destination in the future, Resonance created, programed and distributed an online survey between November 17 and December 10, 2016 to engage visitors who had requested information from the SCTB's website. Objectives of the survey included:

- Conduct a segmentation analysis of respondents to better understand the Snohomish County visitor and how they differ from U.S. and Canadian travelers in general.
- Assess the quality and satisfaction with current destination services, accommodation and amenities, and suggestions for improvement and enhancement.

The total number of respondents was 217. A full Report of results is included in the Visitor Survey Report (December 22, 2016).

Summary

The results of from the Snohomish County Visitor Survey for the Tourism Strategic Plan are satisfactory, reflecting a small but acceptable sample size (N=217). Highlights of the survey follow:

- Respondents tended to live within driving distance of Snohomish County, with a smaller number throughout the U.S. and BC, Canada.
- Respondents tended to be white and older with more than half 55+ years old and nearly half with an annual income exceeding \$60k per year.
- Respondents tended to be “Active Adventurers” and “Infrequent Convenience Travelers” more so than the average US visitor. Snohomish County visitors and residents are less likely to be Sophisticated Explorers, All-in-Enthusiasts or Family-Oriented Frugals.
- Four of 10 respondents identified as friends/family as the inspiration of their visit to Snohomish County. Also registering very well for inspiration were printed visitor guides, online visitor guides and destination websites.
- Seven out of 10 respondents used a laptop/desktop computer to plan / research their visit to Snohomish County, while more than two-thirds used printed materials.
- Nearly two thirds of respondents researched their trips using the internet, while nearly half used travel books / guides and the Snohomish.org website.
- Nearly three quarters of respondents have previously used the Snohomish.org website.
- Respondents generally “Agree” that the Snohomish.org website “Information was easily available” and that they “Found what I was looking for”. Similarly, they said the website was “Easy to navigate”, “The site loaded quickly” and “I like the design”.
- Respondents generally liked the Snohomish County Visitors Guide, the 2015 Hiking Guide and the Mobile Tour - Mountain Loop Highway. The Sky Valley (East County) Backroad Attractions and Package Travel Guides also scored well.
- Only a small percentage of visitors have visited one of the Snohomish County Tourism Bureau VICs.
- Two thirds of those who did visit one of the VICs picked up “Maps of the Area”, while about half collected “Information on Attractions”, “Information on Activities” and “Information on Local Restaurants”.
- Overall Satisfaction of the VICs and the “Range of Information” was high. Respondents also liked the Facilities and said that Information was Up-to-Date and liked the Range of Information.
- Respondents said they would like a visitor center on the “north side of town”, which can be interpreted as north Snohomish County.
- Visitors usually visit Snohomish County as a single person, couples, family or small group.
- More than one third of visitors came to Snohomish County for a day trip, while short trips of 2-4 nights was strong at 22.7%, followed by 15+ nights at 14.3%. One-night trips accounted for only 13.6% of visits.
- Nearly three out of 10 respondents came to Snohomish County for Sightseeing, followed by Nature and Outdoor Activities and Hiking.
- Snohomish County visitors nearly always came to Washington State by automobile.
- For those visitors that stayed overnight, one-third stayed in a Hotel / Motel, while one in 10 stayed at a Campground or RV Park. 12.2% stayed with Family or Friends, while 2.0% stayed in their second home and 1.4% used Airbnb.
- Respondents told us that on their last visit they also visited Seattle (60.0%), followed by Bellingham (21.8%), Bellevue/Kirkland (19.1%), Portland OR (17.3%) and Stevens Pass (15.5%).
- Respondents told us that on their last visit they specifically visited Central - Snohomish (40.6%), followed by Central - Everett (34.6%), South - Mukilteo (22.6%) and North - Marysville / Tulalip (21.1%).

- Seven out of 10 respondents told us that on they are a regular or occasional visitor. Only 20.3% of visitors were first time visitors.
- The perception of Snohomish County as a place to visit definitely improves after the visit.
- Respondents indicated that they found that Snohomish County's Scenery, Beauty, People, Friendliness, Hiking, Restaurants/Dining, Shopping, Variety and Trails are excellent or outstanding.
- In terms of what they found negative, disappointing or like the least about Snohomish County, they said Traffic (in town and at parks/trails), Parking, Weather/Rain, Dirty Washrooms, Homeless People and Closed Restaurants.
- Their suggestions for improving the quality of Snohomish County as a place to visit included Fix the Traffic, provide Better/More Parking, Better Policing/Security (especially at parks/trails), More Tourism Info (online and hardcopy), and More Public Transport options.
- To bring visitors back more often, respondents suggested make it Less Expensive (which is always a top result for this question), Offer Discounts/Deals, More Dining options, provide More Information, Send Regular Information (about events, etc.) and Send Special Information (about non-tourist things).
- When asked what Snohomish County can do to extend their visit by a day or more, they said Lodging Deals/Rewards (very loudly), offer Deals / Discounts / Coupons, host more Festivals / Events and make Campsite Rates more Affordable.
- When survey participants think about Snohomish County they think about Beautiful, Friendly, Green, Mountains, Scenic, Relaxing, Peaceful, Traffic, Nature, Fun, Hiking and Small Town.
- These same visitors to Snohomish County also tend to like visiting Port Townsend (Jefferson County WA) and Bend (Deschutes County OR) for their Variety of things to do, Walkable destinations, not better just Different destinations, better choices of Accommodations, Dining, Big Cities and Less Homelessness.
- Respondents told us that the most important criteria for visiting Snohomish County were: Outdoor Activities & Parks; followed by Paid Places to Stay, Events, Festivals & Fairs, Places to Eat & Drink, Attractions and Amusements and Shopping. The least important aspects for visiting Snohomish County were Nightlife and Spectator Sports.
- In terms of Range and number of activities, respondents said Snohomish County does well in the categories of Outdoor Activities & Parks, Sports & Recreation (Participatory) and Places to Eat & Drink and Shopping. Snohomish County does not do very well in terms of Nightlife or Attractions and Amusements.
- In terms of Quality of Service, Snohomish County does well in the categories of Culture & Performing Arts, Outdoors Activities & Parks, Places to Eat & Drink and Paid Places to Stay. It does poorly in the category of Nightlife.
- In terms of Value for Money, Snohomish County does best in Outdoor Activities & Parks and Sports & Recreation (Participatory). It does poorly in the categories of Nightlife and Attractions and Amusements.
- Among the most interesting responses to additional things visitors would like to see in Snohomish County are: more Events/Festivals, Native American landmarks / history / sites, Beer and Wine tastings/festivals, Live Music, more Hiking and Biking Trails, Food Trucks, Farm to Table dining, and more Small Shops/Boutiques.
- Among the most frequent responses to what aspects of Snohomish County's tourism products can be improved are: more Affordable, Family Friendly, better Wayfinding, Greater Access to wilderness areas,

better Handicap Accessibility, improved Parking, more Winter activities/events, better Litter Removal and better visitor Information.

Stage 4 - Destination Assessment

Resonance Consultancy analyzed social media channels from influential websites such as TripAdvisor and Yelp to identify how many quality experiences cities offer from one product and experience category to the next as rated by locals and visitors themselves. With more than 270 million combined reviews, these sites are both powerful marketing channels for destinations, and can also provide new insight and intelligence into the experiential quality and differentiating characteristics of destinations themselves.

Methodology

The Destination Assessment for Snohomish County measured tourism's supply-side performance and competitiveness based on both absolute and indexed scales: the absolute scale measures the total number of quality experiences; the indexed scale evaluates performance in terms of how many quality experiences are delivered per visitor (i.e. the number of quality experiences per 100,000 visitors).

Visitor estimates for all Washington Counties have been gathered from Dean Runyan Associates. Estimates for Metro Vancouver have been constructed using publicly available data. Changes to visitor estimates will have an inverse impact on the index results.

The rankings that follow are based on an analysis of the number of products or experiences rated as 'very good' or 'excellent' in 17 different areas using TripAdvisor and YELP data.

We have grouped the seventeen areas into six core categories:

1. Culture

The arts and culture in a city

- Major Events
- Museums
- Theaters & Concerts

2. Entertainment

Fun attractions and experiences

- Shopping
- Nightlife
- Amusement Parks
- Zoos & Aquariums
- Casinos & Gambling
- Fun & Games

3. Sightseeing

The natural and built environment of a city

- Sights & Landmarks
- Nature & Parks
- Sightseeing Tours

4. Sports & Adventure

A destination's outdoor activities and adventures

- Outdoor Activities
- Boat Tours & Water Sports

5. Culinary

The food experiences in a destination

- Food & Drink
- Restaurants

6. Lodging

Accommodations in a city

- Hotels

In the creation of the Destination Assessment, Resonance worked with Snohomish County to select 14 “competing” destinations based on locale, well known alternative destinations from previous visitor studies, and aspirational destinations that Snohomish County may seek to emulate.

The competitive set that was selected for Snohomish County included:

- Chelan County, WA (Wenatchee)
- Clallam County, WA (Port Angeles)
- Deschutes County, OR (Bend)
- Jefferson County, WA (Port Townsend)
- King County, WA (Seattle)
- Kitsap County, WA (Port Orchard / Bremerton)
- Lane County, OR (Eugene)
- Metro Vancouver, BC (Vancouver)
- Multnomah County, OR (Portland)
- Pierce County, WA (Tacoma)
- Skagit County, WA (Mount Vernon)
- Spokane County, WA (Spokane)
- Thurston County, WA (Olympia)
- Whatcom County, WA (Bellingham)

Summary

Generally speaking, Snohomish County scores in the top half (1st-8th place) of its competitive set in 15 of the 17 areas of analysis on the absolute scale. This is a reflection of Snohomish County's modest strength as a tourism destination.

In comparison and in contrast, on a relative basis (i.e. quality experiences per 100k visitors), Snohomish County only maintains top half rankings in seven of the 17 categories.

Overall, Snohomish County is ranked in 5th place within its competitive set on the absolute scale and 4th place on the indexed scale.

In absolute terms, Snohomish County scores best in regard to Restaurants (819 quality establishments), Hotels (50), Outdoor Activities (32 quality establishments) and Nature & Parks (31 quality establishments).

In relative terms (i.e. quality experiences per 100k visitors), Snohomish County scores best in regard to Casinos & Gambling (2nd place) and Restaurants (4th place).

Full results for the Destination Assessment (Charts & Tables) are included in the Destination Assessment Report (January 6, 2017)

Snohomish County		Absolute		Indexed	
Category	Quality Experiences (QE)	Ranking of 15	QE per 100k Visitors	Ranking of 15	
Restaurants	819	5	10.7	4	
Food & Drink	19	7	0.2	12	
CULINARY	838	5	11.0	4	
Major Events	0	5	0.0	5	
Museums	16	6	0.2	10	
Theater & Concerts	8	7	0.1	10	
CULTURE	24	6	0.3	10	
Nightlife	14	7	0.2	12	
Shopping	26	8	0.3	14	
Amusement Parks	1	4	0.0	5	
Casinos & Gambling	3	1	0.0	2	
Fun & Games	18	5	0.2	8	
Zoos & Aquariums	1	5	0.0	7	
ENTERTAINMENT	63	7	0.8	13	
Hotels	50	5	0.7	11	
LODGING	50	5	0.7	11	
Nature & Parks	31	9	0.4	13	
Sights & Landmarks	21	4	0.3	6	
Sightseeing Tours	19	9	0.2	11	
SIGHTSEEING	71	5	0.9	11	
Boat Tours & Water Sports	10	8	0.1	10	
Outdoor Activities	32	8	0.4	11	
SPORTS & ADVENTURE	42	9	0.5	11	
TOTAL	1088	5	14.2	4	

Stage 5 - Situational Analysis

The Situational Analysis document set forth Resonance Consultancy's summary of travel and tourism related issues and opportunities for Snohomish County Washington that were explored, discussed, debated and prioritized in the development of the Tourism Strategic Plan update.

This document focused attention on the research produced for Stages 1-5 of the Tourism Strategic Plan project and served as a benchmark for the following Stages 6-8 of Visioning, Plan Development and Final Report.

This Stage of the Tourism Strategic Plan gave the project team an opportunity to review and understand the history, current results, future plans and target market of Snohomish County tourism within the context of the broader economy, economic development and quality of life, and to embark on a detailed examination of its characteristics, visitor profile and market prospects.

To produce the Situational Analysis, we interviewed / surveyed nearly 100 destination stakeholders to understand their issues and opportunities; surveyed nearly 200 visitors to understand their perspective on Snohomish County as a place to visit and how it compares to the competitive set; and dove-deep into all types of secondary research.

The following list of Key Issues and Opportunities was drawn from the individual pieces and collective body of research conducted for the Situational Analysis and suggested a number of emergent findings and potential directions with respect to the updated Tourism Strategic Plan for Snohomish County. The conclusions were not prioritized, but were grouped into two areas of responsibility (County Responsibilities and Snohomish County Tourism Bureau Responsibilities) around which the Tourism Strategic Plan could be organized. Please note that some issues and opportunities are included in both the county and SCTB list*.

Snohomish County Responsibilities

- Biking Trails, Facilities, Infrastructure, Amenities and Transport
- Business Start Up and Permits
- Capacity Building*
- Event & Festival Strategy
- Institute of Flight and Boeing Tour
- Mountain Loop Highway
- New Developments / Parks
- Outdoor Recreation
- Outdoor Town or Resort Destination
- Sustainable Product Development
- Regional Cooperation*
- Mobile Connectivity and Open Data
- Seasonality*
- Second Homes / Weekend Homes / Vacation Homes
- Strategic Plan Programs
- Tourism Bureau Funding
- Tourism Cooperation*
- Sustainable Tourism Focus / Regional Development*
- Tourism Research*
- Tourism Trends
- Trails and Trail Town Connectivity
- Social Media Capacity Building*
- Visitor Capacity Planning / Traffic / Transportation Plan

SCTB Responsibilities

- Brand and Branding
- Brand Education and Cooperation
- Breweries Promotion
- Capacity Building*
- Casinos and Gambling
- Day Trippers
- Harbor / Boating Tourism
- Market Segmentation
- Professional Marketing
- Regional Cooperation*
- Repeat Visitors
- Seasonality*
- Seattle's Backcountry
- Tourism Cooperation*
- Sustainable Tourism Focus / Regional Development*
- Tourism Research*
- Social Media Capacity Building*
- Visitor Information Centers and Distribution
- Visitor Itineraries
- Website Design

The detailed Issues and Opportunities included:

Biking Trails, Facilities, Infrastructure, Amenities and Transport – there may be an opportunity to significantly increase biking related visits thru the development and enhancement of signature bike trails (such as Centennial), new bike trails, biking facilities, infrastructure, amenities, transport and events / festivals.

Brand and Branding – The opportunities for the overarching brand identity of Snohomish County and the Open Up brand are many including the continuation and acceleration of SCTB efforts to refresh and reposition the brand look and feel and apply across the website, social media and print collateral, moving forward with a fresh focus on vivid imagery of the region, minimized copy content and immersive documentary and emotive narrative films.

Brand Education and Cooperation - there is an opportunity and need to educate / re-educate industry players about the brand (Open Up) and engage them to use and / or better implement the brand through cooperative programs or their own marketing efforts.

Breweries Promotion – there may be an opportunity to increase visitor attention, activities and promotional spending on Snohomish County breweries as well as provide / deliver a breweries map / tour / app that facilitates the breweries visitor experience.

Business Start Up and Permits – there may be a need to speed up or fast track the business startup and permitting process for new tourism activities, attractions, accommodations and food / beverage operators, especially in the eastern and northern parts of Snohomish County where tourism amenities are limited and tourism potential is high. The county may want to explore “Pop Up” business licensing / operations in certain sectors to accommodate seasonal visitor patterns and locations that may be difficult to support year round operations.

Capacity Building – there may be an opportunity for the county and the Tourism Bureau to provide tourism capacity building services to towns, cities, organizations and private sector operators, especially SMEs to help build, enhance and grow their tourism products and services. Hoteliers may also benefit from orientation to existing tourism activities that are available to their guests.

Casinos and Gambling - Snohomish County registers three quality establishments in the category of Casinos & Gambling (Tulalip Casino, Angel of the Winds Casino and Quil Ceda Creek Casino) putting it in 1st place (absolute) and 2nd place (relative) among its competitive set in this category. Without question, Snohomish County enjoys a competitive advantage in this category of visitor activities and as such should work closely with these establishments to promote and market their businesses to appropriate visitor markets. Snohomish County should also engage with these visitors to extend and expand their visit beyond the doors of the Casino to other outside activities and services.

Day Trippers – although overnight visitors and their higher per capita spending are a key priority for Snohomish County tourism, the spending by day-trippers, which total nearly 40% of all visitors, makes a significant

contribution to total spending. There may be an opportunity to focus greater resources, effort, and marketing on this important market segment.

Event & Festival Strategy – Snohomish County should consider creating a countywide Event & Festival Strategy and organization / committee / stakeholder group that engages the county, towns, cities and the private sector to develop, schedule, enhance, incubate, direct, market, promote and manage a portfolio of events and festivals for residents and visitors alike.

Harbor / Boating Tourism – there may be an opportunity for greater focus on harbor visits in Everett and other Snohomish County ports / marinas as well as increasing boating / sailing tourism in general.

Institute of Flight and Boeing Tour – The Institute of Flight (an independent, 501(c)(3) nonprofit organization) manages the airport facility that contains the Future of Flight Aviation Center and is the front and back door to the Boeing Tour. The Future of Flight facility is partially funded by the Snohomish County Public Facilities District. Although the Boeing Tour and the Future of Flight Aviation Center cohabitate, their missions and objectives do not necessarily or always align. Based on conversations with stakeholders:

- The facility may require new / greater investment to keep up with traffic / parking growth and demand for exhibits that are up to date, attractive and engaging. Current standards for non-Boeing elements are not satisfactory.
- The county may need to engage a professional museum / retail / operations consultant to review existing facilities, operations, exhibits and shops to create a forward-looking strategy.
- The county may need to re-assess the PFD status of the Aviation Center to determine if the current management structure is the best use of resources.
- The Future of Flight Aviation Center may be confusing to visitors who are primarily there to take the Boeing Tour.
- The revenue sharing arrangement between the Institute of Flight and Boeing is confusing and may require clarification and greater transparency.
- Connectivity between the Future of Flight Aviation Center and the Historic Flight Foundation, Paul Allen's Flying Heritage Collection, and the Museum of Flight Restoration Center may require future assessment to fully realize the potential of all aviation attractions.

Market Segmentation - there is a significant opportunity for Snohomish County to focus its marketing, promotion and destination development resources on “Active Adventurers” and “Infrequent Convenience Travelers” which account for 84.2% of total visitors. Snohomish County visitors and residents are less likely to be Sophisticated Explorers, All-in-Enthusiasts or Family-Oriented Frugals.

Mountain Loop Highway – three of every 10 visitors come to Snohomish County for sightseeing and many do so from the comfort of their vehicles. As such, there may be a significant opportunity to increase Snohomish County tourism by paving the remainder of Mountain Loop Highway.

New Developments / Parks – there may be an opportunity to celebrate and facilitate new developments and parks in Snohomish County including, but not limited to, the Port of Everett's Waterfront Place Central

redevelopment project, which is set to unify the marina and surrounding property with a sustainable and unique commercial, recreation and residential community.

Outdoor Recreation – there may be a need to create and implement an outdoor recreation master plan for Snohomish County that creates significant opportunity for growing the tourism industry and provides funding across city/town lines. One major area of focus should include review, analysis and recommendations on mountain biking use. In addition, although Snohomish County does not score particularly high amongst its competitive set in Nature & Parks and Outdoor Activities, the competition assessment research only takes into consideration the number of visitor activities in these categories and not the size and scope of the individual activities themselves.

Outdoor Town or Resort Destination - Snohomish County has abundant outdoor recreation assets, but lacks a strong, vibrant anchor town with a range of accommodations and amenities to host and keep guests in the area. There may be an opportunity to develop an existing community situated in a stunning natural setting with a variety of outdoor recreation opportunities nearby. Developing a destination resort in such a town or community may also help to bring more overnight visits and attract additional tourism businesses.

Product Development - previous visitors have told us that their key criteria for selecting Snohomish County for a visit were Outdoor Activities & Parks; Paid Places to Stay, Events, Festivals & Fairs, Places to Eat & Drink, Attractions and Amusements and Shopping. Snohomish County's tourism development efforts should focus on these areas. Specifically, visitors want to see: more Events/Festivals, Native American landmarks / history / sites, Beer and Wine tastings/festivals, Live Music, more Hiking and Biking Trails, Food Trucks, Farm to Table dining, and more Small Shops/Boutiques. Visitors also want to see improvements associated with: Family Friendly activities, better Wayfinding, Greater Access to wilderness areas, better Handicap Accessibility, improved Parking, more Winter activities/events, better Litter Removal and better visitor Information. Lastly, the Competitive Assessment also indicates that 10 out of 17 Snohomish County visitor activities fall into the bottom half of its competitive set of rankings, illustrating major weaknesses in the county's tourism offering which should be the focus of new efforts where appropriate.

Professional Marketing – if budget allows, there may be a need to engage a professional marketing firm to review and assess programs and activities of the Snohomish Tourism Bureau, and to offer constructive advice, enhance creativity and increase return on investment.

Regional Cooperation - there may be an opportunity to create cooperative regional marketing and promotional programs with the Greater Seattle Area tourism bureaus based on the fact that 60% of visitors to Snohomish County also visit Seattle.

Repeat Visitors - there is a significant opportunity to identify and market directly to seven out of 10 Snohomish County visitors, since they are regular or occasional visitors. Repeat visitors are looking for Discounts/Deals, More Dining options, More Information, Regular Information (about events, etc.) and Special Information (about non-tourist things).

Mobile Connectivity and Open Data – there may be an opportunity to improve mobile connectivity in areas frequented by visitors that do not have adequate coverage in Snohomish County, which limits connectivity for visitors and business opportunities for operators. There may also be opportunities to access open data through mobile access for insights on visitor activities through heat maps and social media

Seasonality – Snohomish County does extremely well during the peak months of May through September, but has an even greater opportunity for growing tourism in the shoulder and off peak season of October through April. Product development and marketing efforts should be focused on building activities and events for these periods, while marketing and promotion spend should also be focused on these periods.

Seattle's Backcountry – there may be an opportunity to highlight and intensify Snohomish County marketing and promotion as "Seattle's Backcountry", focusing on the rural, natural and recreational opportunities for Seattle residents and visitors.

Second Homes / Weekend Homes / Vacation Homes – the second / weekend / vacation home market in Snohomish County is not well understood: who owns what, how often they are used, how they are used and what they contribute to tourism. There may be an opportunity to learn important information about this market that could enhance tourism in the region.

Strategic Plan Programs – As an official county document, the Tourism Strategic Plan has been used by officials to monitor, measure and assess the performance of county programs, staff and the Tourism Bureau. Although there are a number of benefits to a strict assessment, the Strategic Plan was not designed to serve this specific purpose, so there is a need for the updated Strategic Plan to include greater flexibility of program timing, funding and responsibilities to allow for changing and unexpected circumstances.

Tourism Bureau Funding – there is a need for greater financial security and predictability of funding for the Snohomish Tourism Bureau to provide for better and more consistent planning and operations. The Bureau may also benefit from a longer-term contract, as a one-year contract is not conducive to long-term planning.

Tourism Cooperation – there is a strong need for greater coordination, collaboration and cooperative programs between Snohomish County, Snohomish Tourism Bureau and the tourism / chamber leaders from the individual towns, cities and Native American communities of Snohomish County including but not limited to regular communications, meetings, committees, working groups, roundtables etc. Cooperative efforts might focus on infrastructure development, festivals and events, marketing efforts, website design and functionality, itineraries, capacity building, etc. The same is true for greater coordination and collaboration with neighboring counties including King, Skagit and Winthrop Counties.

Tourism Focus / Identity – Snohomish County should consider the potential for greater tourism development and marketing / promotion focused on a short-list of key visitor activities such as: Outdoor Recreation, Seattle's Playground, Aerospace Capital, etc.

Tourism Research - Snohomish County should maintain and communicate basic and detailed tourism statistics, research and information (nationally, statewide and countywide) on a regular basis to monitor, inform, identify

opportunities / threats and educate industry stakeholders on recent trends, current results and future business outlook.

Tourism Trends - Snohomish County should monitor and communicate tourism trends (international and national) on a regular basis to identify and action important issues and opportunities that could be applicable for the county's tourism product, services or marketing / promotion activities.

Trails and Trail Town Connectivity – there may be an opportunity to focus and apply greater resources and attention on recreational trails (land and water, hiking and biking, ocean, lakes and rivers) and trail town connectivity and development in Snohomish County to build tourism product in areas where Snohomish County is particularly attractive (Outdoor Recreation, Nature & Parks).

Social Media Capacity Building – there may be an opportunity to build capacity for use of TripAdvisor, Yelp, Facebook, Twitter, SnapChat, Instagram and other social media to enhance and raise the level of visibility of Snohomish County tourism operators and opportunities with consumers.

Visitor Capacity Planning / Traffic / Transportation Plan – there may be an opportunity to better manage traffic, ease congestion, create more ride-sharing programs between urban and rural areas and carry out capacity planning on certain visitor routes / highways (i.e. US Route 2 from Everett to Leavenworth) or certain destinations (i.e. National Forest) during peak season, as well as promote alternative routes and lesser known destinations to distribute visitor traffic. This could be part of a broader Visitor Transportation Plan for Snohomish County.

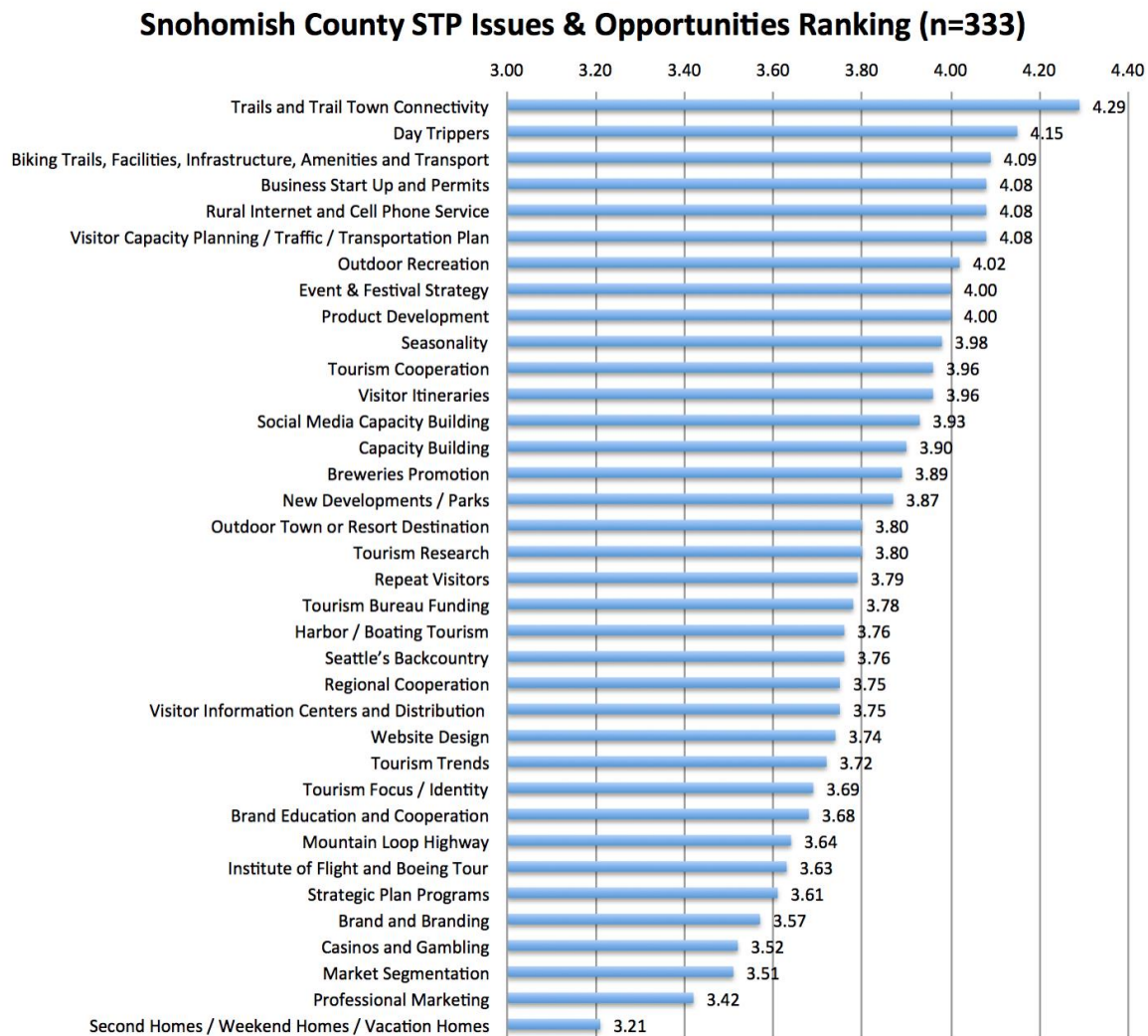
Visitor Information Centers and Distribution – there may be an opportunity to enhance visitor information distribution thru alternative sources / additional locations ("North side of town") as well as online applications and onsite locations (events / festivals).

Visitor Itineraries – there may be an opportunity to better promote "itineraries" to provide more options and ideas for people visiting Snohomish County. Itineraries might include: culinary, breweries, biking/hiking, antiquing, farms, arts, historical sites / assets, nightlife, etc.

Website Design – there may be an opportunity to improve and enhance the Snohomish Tourism Bureau website to achieve greater visitor appeal, and real-time marketing/sales opportunities.

Stage 6 - Visioning Workshop

In preparation for the Stage 6 Visioning Workshop, Resonance conducted a survey of 333 stakeholders to prioritize the Issues and Opportunities identified and articulated in the Stage 5 Situational Analysis Report. The following graphic illustrates the results of their priority ranking.



The survey also asked takers an open-ended question about other issues or opportunities that may not have been included in the survey. The following is a summary of their additional responses:

- Include Equestrian activities and trails
- Multi-day trail experiences should be emphasized with accessible camping
- There should be greater emphasis on Agritourism
- Too much traffic = no more visitors
- Infrastructure maintenance (roads and trails) = outdoor recreation
- There should be greater emphasis on Evergreen State Fairgrounds
- Greater emphasis on maintaining existing infrastructure instead of developing new infrastructure
- Connecting smaller trails to the larger trail system is important
- Consider San Juan County's home sales tax (1%) to fund purchase of parks
- Focus more on resident quality of life than more visitors
- Better snow removal to allow parking
- Grow the Conventions and Meeting Market
- Champion the National Forest Services so they have greater resources
- Greater emphasis on Monroe issues and opportunities
- Base recommendations on economic return and resident quality of life

Following the presentation of survey results, Visioning Workshop participants and their table groups completed a number of exercises to provide additional input and detail to the consulting team focused on:

- Identifying key products / places on the Snohomish County map which would best cater to Snohomish County's target audience.
- Choosing three words to describe Snohomish County as a unique destination.
- Selecting 15 photos to identify the most important key assets of the destination, and to describe Snohomish County brand as a destination.
- Writing a vision statement.
- Detailing potential implementation activities associated with Place Issues & Opportunities:
 - Waterfront / Water Trails
 - Bike Trails
 - Driving Trails
 - Traffic and Transportation
- Detailing potential implementation activities associated with Product Issues & Opportunities:
 - Outdoor Recreation
 - Resort Destination
 - Breweries and Wineries
 - New Developments / Parks
- Detailing potential implementation activities associated with Programming Issues & Opportunities:
 - Seasonality
 - Events & Festivals Strategy
 - Day Trippers, Repeat Visitors and Visitor Itineraries

- Visitor Information / Apps

These results have been incorporated into the Strategic Tourism Plan.

Stage 7 - Recommendations and Review

Stage 7 of this project included a draft of the Strategic Tourism Plan by Resonance Consultancy, a full scale review by the Project Team and the Project Steering Committee. Comments and edits were provided to Resonance, which were incorporated into the Stage 8 - Final Report.

Stage 8 - Final Report

Stage 8 of this project included incorporation of all comments and edits from the Project Steering Committee and final review and acceptance by Snohomish County.

The 2010 Strategic Tourism Plan Review and Performance

Berk Consulting reviewed the 2010 Plan Strategies with input and reflection from the Snohomish County Tourism Bureau (SCTB) and Snohomish County Parks and Recreation, Tourism (SCPRT). The focus here is to look at how well the strategies served the county's goals. The summary table below provides a high-level reflection on the progress of each strategy.

Summary Findings

- Overall, progress has been made on the majority of strategies and their tasks over the past years with ongoing and continuing work.
- One strategy was determined not worthy of advancing (Strategy 4). Although the intent was worthy and important, it was too specific to be its own strategy.
- Only a few strategies and tasks have not been started. Strategy 18 has not been started due to the need for cooperation and interest of actors beyond the means and control of the Tourism Bureau and Snohomish County Parks and Recreation, Tourism Division.
- Most strategies were viewed as having a positive impact on tourism development in the county. Only a few strategies (Strategies 4, 13, 14, and 18) were viewed as having a neutral impact.
- It is estimated that 54% of the total planned budget was actually spent to implement the strategies and tasks. The total planned budget to implement the plan from 2011 - 2015 was \$2.2 million. Estimated actual expenditures for 2011 – 2016 was \$1.2 million.

Strategy Review Summary

Legend

Complete	Task was started and completed. No more work is being done on the task.
Ongoing	Task is recurring/ongoing, perhaps completed in years past and continuing.
In progress	Discrete tasks that have been started but are not finished.
Not started	Task not yet started.
Dropped	Task has not been advanced for specific reasons.

Strategy	Status	Reflections on Impact	Summary Progress Notes
Goal 1. Stronger Tourism Brand and Marketing Strategy			

1. Repackage the Snohomish County brand into an accessible adventure destination.	Complete and Ongoing	Positive	Re-branding initiatives completed and had a positive impact overall. Work is ongoing to refine the brand and further market the county as a destination.
2. Develop strong cross-promotional marketing to encourage visitors to experience anchor clusters, anchor attractions, sustaining clusters, and sustaining assets.	Ongoing	Positive	Many accomplishments since 2013 to promote and market anchor and sustaining attraction through trainings, rural tourism workshops, mobile tours, collateral, and website improvements. There is a desire to revise the zone structure and tactics with a focus on regional networks.
3. Develop the capacity to better promote hidden assets.	Ongoing	Neutral / Positive	Also addressed through Strategy 2. Accomplishments include mobile tours, website enhancements, tourism maps, promotion collateral and sub-branding of river towns.
4. Have fun and engage people in surprising ways.	In progress / Dropped	Neutral	Task was not recommended for implementation. This Strategy should focus on training and workshops for local communities to produce appropriate, quality events.

Goal 2. Anchor Clusters and Anchor Attractions Focus with Strong Cross-Promotional Efforts			
5. Expand the convention and meeting booking function of the Snohomish County Tourism Bureau.	In progress	Positive	Additional SCTB staff was hired in 2015 to help implement this strategy. The meeting facility guide has also been updated in 2014, 2015, and 2016. Some tasks require the interest, approval and cooperation with local communities (to address infrastructure gaps), and with the Snohomish County Lodging Association.
6. Strengthen the aviation cluster and knit it to the broader network of tourism assets.	Ongoing	Positive	Much work has been completed and is ongoing to develop and strengthen the aviation cluster. However, this Strategy assumed that the broader network of hidden tourism assets was more robust than it is. The aviation attractions are not as well-known locally as they should be by the larger and smaller tourism assets, and need more stakeholder engagement and development work to connect.
7. Build on the county's strengths in tribal gaming.	Ongoing	Positive	Continue building relationships and partnerships with the tribes, particularly with the hotels and the shopping/retail. Don't limit engagement to gaming in the future.

8. Leverage the county's considerable outdoor recreation assets.	Ongoing	Positive	This Strategy has been a pillar of the plan. The work done to implement this Strategy produced new roundtables, rural tourism workshops, river recreation planning, working with recreation and conservation organizations, and connecting hidden assets with outdoor recreation for tourism development.
9. Promote and support the county's diverse shopping options.	Ongoing	Positive	Shopping mobile tours and ads have been completed and ongoing since 2012.
10. Continue to build the county's organized sporting events market.	Ongoing	Positive	The sports program is earning excellent returns. However, funding the sports program could be improved by a more predictable funding model.
11. Promote adventure-focused day trip itineraries, maps, packages, and promotions.	Ongoing	Positive	Work has been ongoing since 2013. This should be combined with Strategy 12 into a more regional approach.
12. Promote all itineraries, maps, packages, and promotions within target audience communities.	Ongoing	Positive	Advertising campaign on adventure day trips has been completed and ongoing work since 2012. Should be combined with Strategy 11.

Goal 3. Rich Network of Sustaining Clusters and Sustaining Assets			
13. Take a collaborative approach to strengthening the county's sustaining tourism clusters.	Ongoing	Neutral	This is a large and ongoing undertaking. These focus areas will always be a priority, and working with stakeholders on collaborative ways to connect, promote, and support them will always be ongoing.
14. Identify sustainable tourism opportunities.	Complete	Neutral	Sustainable features of some varied attractions are notable (green built structures – rain gardens, etc.) and are inventoried by the County Office of Sustainability. The term “sustainability” has changed over the years, and the intent of this strategy needs to be clarified.

Goal 4. Stronger County Tourism Infrastructure			
15. Improve the tourism information delivery system.	Complete and Ongoing	Positive	Tourism Bureau website has been improved and includes itinerary functions. More storytelling features will be added in 2016.
16. Update approach to putting information in visitors' hands.	Ongoing	Positive	There has been development of a variety of tools, particularly mobile and digital, for delivering information and tours.
17. Improve wayfinding and support the serendipity of discovery.	In progress	Positive	Many recreation and tourism wayfinding and signage projects have been installed on state and forest roads, and in municipalities and parks. However, much coordination is needed from cities, towns, and WSDOT.
18. Improve public transportation options to enhance access to tourism assets.	Not started	Neutral	Many regional needs have been identified, but access to public transportation is a shared problem for many areas of Snohomish County.
19. Support the broadening of the county's range of overnight options.	In progress	Positive	Several new hotels have opened in the county since 2010, and more hotels are coming online. Lodging options are still needed in rural areas. Recruitment of higher-end lodging options has not yet been implemented.

Goal 5. Enhanced Organizational Capacity			
20. Strengthen the county's ability to coordinate tourism efforts and implement this plan.	Complete and Ongoing	Positive	A single, full-time position was created in 2014 to implement the plan. Six-month temporary help was added 2016 to assist with projects. Additional staff is needed for ongoing plan implementation.
21. Use data to strengthen tourism promotion and development efforts.	Ongoing	Positive	Many tasks completed and ongoing for data collection, but there is room for improvement to help strengthen collaborative sharing capabilities.
22. Broaden and enrich the conversation between the county and stakeholders.	Ongoing	Positive	Many successes in reaching out to a broad range of tourism stakeholders. Since 2014, many newly involved organizations with a stake in Snohomish county tourism are regularly included and relied upon for guidance, planning resources and information on asset/product planning and development.
23. Build stronger partnerships with the tribes to enhance and encourage indigenous tourism experiences.	Ongoing	Positive	Ongoing engagement and discussions with tribal partners related to various aspects of tourism including trails and outdoors recreation can support indigenous experiences.
24. Support professional development for the county's tourism workforce.	Ongoing	Positive	Many professional development workshops and trainings have been held and are ongoing.

Goal 6. Tourism Funding Resources Align with Strategic Goals			
25. Leverage the lodging tax effectively to advance the tourism strategies.	Complete and Ongoing	Neutral / Positive	Some tasks completed, but revised grant criteria could improve return-on-investment (ROI) in areas that have no lodging taxes available. Improvements to application process are needed (e.g. make applications more visible and available online and provide additional workshops for applicants).
26. Support the emerging Tourism Promotion Area.	Complete and Ongoing	Positive	Task completed. Additional improvements may help better connect the TPA funding applications with the Strategic Plan.

The following table compares the 2010 planned budget to actual expenditures at the strategy level. These numbers are best estimates, with the goal of understanding to what extent actual expenditures followed the plan's guidance.

2010 Strategic Plan Budget: Planned vs. Actual Expenditures

Strategy	Planned (2011-2015)	Actual (2011-2016)	Planned-Actual
1	\$250,000	\$147,047	\$102,953
2	\$72,500	\$77,451	-\$4,951
3	\$80,000	\$4,000	\$76,000
4	\$35,000	\$0	\$35,000
5	\$30,000	\$69,925	-\$39,925
6	\$125,000	\$34,177	\$90,823
7	\$0	\$0	\$0
8	\$0	\$62,108	-\$62,108
9	\$200,000	\$41,063	\$158,937
10	\$0	\$9,740	-\$9,740
11	\$100,000	\$263,404	-\$163,404
12	\$0	\$0	\$0
13	\$35,000	\$0	\$35,000
14	\$10,000	\$0	\$10,000
15	\$225,000	\$193,890	\$31,110
16	\$170,000	\$19,771	\$150,229
17	\$225,000	\$0	\$225,000
18	\$0	\$0	\$0
19	\$0	\$0	\$0
20	\$510,000	\$250,000	\$260,000
21	\$90,000	\$9,000	\$81,000
22	\$0	\$500	-\$500
23	\$0	\$0	\$0
24	\$50,000	\$0	\$50,000
25	\$0	\$0	\$0
26	\$0	\$0	\$0
Total	\$2,207,500	\$1,182,076	\$1,025,424
		% Spent of Budget	54%

Source: Snohomish County Tourism Bureau 2016, Snohomish County Tourism Department, and BERK, 2016

*Notes: Actual expenditures are best-guess estimates provided by the Tourism Bureau. It combines whole numbers for 2011-2015 and an estimate for the year 2016 of only STP funds that the Bureau invoiced the county for, although some strategies were accomplished through the use of both LTAC funds and STP funds. These numbers are not meant to be used for financial accounting, but to provide an estimate for comparison purposes.

Assessing the Impact of the 2010 Plan

As asserted in the 2010 Plan, tourism is economic development. It creates many tourism-related jobs, from entry-level to professional, and boosts jobs and economic activity in related sectors. Successful economic development is typically defined as bringing new money into a region. Tourism does just that, injecting dollars from outside the region into the local economy. These new dollars create direct, indirect, and induced economic impacts that ripple through the economy.

Investments in tourism may generate additional benefits by enhancing quality of life for local residents, and by raising awareness of what the region has to offer. Individuals may come once to an area for leisure or business travel, only to return later in life to relocate a business, buy a second home, or retire. Such impacts are impossible to measure, but every tourism region has stories that demonstrate how this dynamic plays out.

Significant resources were invested to implement the 2010 Plan. As the table above shows, approximately \$1.2 million was spent to implement the plan between 2011 and 2016. While it is natural to ask about the return on that investment, it is impossible to show direct correlation between many investments and the performance of the Snohomish County tourism industry. A later work product in the planning process will report on key measures of Snohomish County tourism market performance. While this should not be seen as a direct correlation with the investments and efforts made in implementing the 2010 Plan, it will provide some useful context.

The complicated nature of the county's tourism market makes it impractical to analyze how the market would have performed had these expenditures not been made. Snohomish tourism is affected by significant exposure to exogenous economic effects such as the health of the Canadian or Chinese economy. Moreover, Snohomish is a large county, with rural and urban assets, drawing a diverse set of travelers. This diversity is strength, but also means it is a fragmented and complex system with many interrelated factors, making it difficult to isolate the impact from individual investments.

Given these complications and the impossibility of conducting a robust return on investment study within the context of this planning process, it is helpful to review what is known about investments in tourism generally. A paper by Oxford Economics[1] makes the following assertion: "A 10% increase in a destination's visitor-related employment relative to the U.S. average tends to be followed by a 1.5% rise in broader employment in the short-run." In addition to direct, indirect, and induced economic impacts associated with attracting tourist and visitor spending to a region, the report describes the following "catalytic impacts of destination promotion."

- Building transportation networks and connecting to new markets. By supporting travel and tourism, destination promotion supports development of transportation infrastructure, helping support greater accessibility and supply logistics that are, in turn, important in attracting investment in other sectors.
- Raising the destination profile. Destination promotion builds awareness, familiarity, and relationships in commercial sectors (institutions, companies, individuals) that are critical in attracting investment. Similarly, destination promotion raises the destination profile among potential new residents, supporting skilled workforce growth that is critical to economic development.
- Targeted economic development through conventions and trade shows. By securing meetings, conventions, and trade shows for local facilities, destination management organizations attract the very prospects that economic development agencies target. Not only do such visits create valuable exposure

among business decision makers, they create direct opportunities for economic development agencies to deepen valuable connections with attendees.

- Raising the quality of life. The visitor economy that is fueled by destination promotion supports amenities and standards of living that are valued by residents and that are important in attracting investment in other sectors.

Beyond asserting these benefits, the report explains why destination-level marketing is effective and why pooling resources to invest in a countywide tourism market makes sense. Larger-scale efforts overcome three marketing challenges that individual tourism and visitor attractions face:

- First, the report asserts that “the visitor economy is fragmented.” This means that “at the level of an individual business, the returns on independent marketing to attract visitors to a destination can be less compelling. However, when viewed at the level of the destination, there is a more direct connection. The destination captures a substantial dollar amount per visitor, and in aggregate there are compelling returns on effective destination marketing.”
- Second, “the primary motivator of a trip is usually the experience of a destination, extending beyond the offerings marketed by a single business.” Visitors typically do not travel based on the merits of an individual business or attraction, but based on the aggregate offerings of the region.
- Finally, “effective marketing requires scale to reach potential visitors across multiple markets.” This simply means that effective marketing can require the “significant and consistent funding” associated with pooled regional efforts, rather than small-scale efforts by individual businesses that struggle to be heard above the noise of the marketplace of competing attractions.

While this and other research bolsters the rationale for a countywide tourism strategy, quality of execution is of greatest importance. The review of the 2010 Plan contained in this document creates an important opportunity to evaluate what is working and what is not. This will be a critical input into the development of the most effective strategy for the timeframe beyond 2017.

[1] Destination Promotion: An Engine of Economic Development. Oxford Economics, November 2014.
<http://www.oxfordeconomics.com/engine>



Strengths, Weakness, Opportunities and Threats (SWOT) Analysis

The Strategic Conversations with Stakeholders yielded a wealth of information about the Strengths, Weaknesses, Opportunities and Threats to Snohomish County Tourism and future growth. The following material summarizes those points:

<p>Strengths</p> <p>Boeing Tour</p> <p>Breweries</p> <p>Casinos</p> <p>Day Trippers</p> <p>Outdoor Recreation</p> <p>Seattle’s Backcountry / Playground / Backyard</p> <p>Seattle Premium Outlets</p>	<p>Weaknesses</p> <p>Business Start Up and Permits</p> <p>Capital Improvement</p> <p>Everett Nightlife</p> <p>Infrastructure and Facilities</p> <p>Professional Marketing</p> <p>Rural Internet and Cell Phone Service</p> <p>Seasonality</p> <p>Second Homes / Weekend Homes / Vacation Homes</p> <p>Social Media Capacity Building</p> <p>Strategic Plan Programs</p> <p>Tourism Bureau Funding</p> <p>Tourism Cooperation</p> <p>Tourism Funding Sources</p> <p>Tribal Engagement</p> <p>Visitor Capacity Planning / Traffic / Transportation Plan</p> <p>Visitor Research</p> <p>Wayfinding</p> <p>Website Design</p>
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<p>Opportunities</p> <p>Biking Trails, Facilities, Infrastructure, Amenities and Transport</p> <p>Branding</p> <p>Capacity Building</p> <p>Cascade Loop (Signature Attraction)</p> <p>Commercial Air Service</p> <p>Event & Festival Strategy</p> <p>Food Trucks</p> <p>Harbor / Boating Tourism</p> <p>International Visitors</p> <p>Information Centers and Distribution</p> <p>Institute of Flight and Boeing Tour</p> <p>Locally Made</p> <p>Mountain Loop Highway</p> <p>New Developments / Parks</p> <p>Tourism Focus / Identity</p> <p>Trails and Trail Town Connectivity</p> <p>Visitor Itineraries</p> <p>Water Trails / Biking Trails / Hiking Trails</p>	<p>Threats</p> <p>Exchange Rate</p> <p>Washington State Tourism Office</p>
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Strengths

In the interviews, group sessions and online survey, stakeholders have noted, suggested, or indicated that the following areas / items are unique strengths of Snohomish County tourism:

Boeing Tour - the Boeing Tour is probably the single most visible visitor attraction in Snohomish County attracting visitors from around the country and around the world.

Breweries – Snohomish County breweries are attracting a growing number of visitors and are increasing in quality, quantity and popularity.

Casinos - the Quil Ceda Creek Casino and the Angel of the Winds Casino are major visitor attractions for Snohomish County bringing in day trippers and overnight guests from around the region.

Day Trippers – although overnight visitors and their higher per capita spending are a key priority for Snohomish County tourism, the spending by day-trippers makes a significant contribution to total spending.

Outdoor Recreation – without question, visitors are coming to Snohomish County to enjoy outdoor recreational opportunities.

Seattle’s Backcountry – Snohomish County well known for serving as “Seattle’s Backcountry”, focusing on the rural, natural and recreational opportunities for Seattle residents and visitors.

Seattle Premium Outlets - one of the most important visitor attractions in Snohomish County is the Seattle Premium Outlets.

Weaknesses

In the interviews, group sessions and online survey, stakeholders have noted, suggested, or indicated that the following areas / items are possible weaknesses of Snohomish County tourism:

Business Start Up and Permits – Stakeholders have suggested that the business start-up and permitting process for new tourism activities, attractions, accommodations and food / beverage operators is difficult, time consuming and expensive.

Capital Improvement – a number of private tourism operators in Snohomish County could benefit from capital improvement.

Everett Nightlife – Nightlife opportunities in downtown Everett are limited.

Infrastructure and Facilities – there are limited relationships between Snohomish County infrastructure and facilities (funding and development) and tourism needs / demands.

Professional Marketing – the Snohomish Tourism Bureau could benefit from some constructive advice, enhanced creativity and increased return on investment.

Rural Internet and Cell Phone Service– there are areas frequented by visitors that do not have internet and / or cell service in Snohomish County, which limits connectivity for visitors and business opportunities for operators.

Seasonality – Snohomish County does extremely well during the peak months of May through September, but has poor performance in the shoulder and off peak season of October through April.

Second Homes / Weekend Homes / Vacation Homes – the second / weekend / vacation home market in Snohomish County is not well understood, who owns, how often they are used, how they are used and what they contribute to tourism.

Social Media Capacity Building – Use of TripAdvisor and other social media by Snohomish County tourism operators and establishments is limited.

Strategic Plan Programs – the existing Strategic Plan is not flexible regarding program timing, funding and responsibility to allow for changing and unexpected circumstances.

Tourism Bureau Funding – the Snohomish County Tourism Bureau is limited by its financial security and predictability of funding in order to provide for better and more consistent planning and operations.

Tourism Cooperation – there is need for greater coordination, collaboration and cooperative programs between Snohomish County, Snohomish Tourism Bureau and the tourism / chamber leaders from the individual towns, cities and Native American communities of Snohomish County including but not limited to regular communications, meetings, committees, working groups, roundtables etc.

Tourism Funding Sources – it is difficult to understand and coordinate the various tourism funding sources (Small Fund, Large Fund, LTAC, TPA, etc.) that are used to market, promote and develop tourism in Snohomish County.

Tribal Engagement – there is limited engagement between tribal officials / their communities and Snohomish County tourism operators and officials.

Visitor Capacity Planning / Traffic / Transportation Plan – Snohomish County needs to better manage traffic, ease congestion, create more ride-sharing programs between urban and rural areas and carry out capacity planning on certain visitor routes / highways (i.e. US Route 2 from Everett to Leavenworth) or certain destinations (i.e. National Forest) during peak season, as well as promote alternative routes and lesser known destinations to distribute visitor traffic.

Visitor Research – there is a need to better understand Snohomish County visitors such as: who they are, where they come from, what they do here, etc. Stakeholders could benefit from detailed visitor tracking research, which shows how visitors consume Snohomish County, especially off the I-5 corridor.

Wayfinding – there is a need to increase and improve wayfinding that is authentic to the “rural experience”.

Website Design – there is a need to improve and enhance the Snohomish Tourism Bureau website to achieve greater visitor appeal, and real-time marketing/sales opportunities.

Opportunities

In the interviews, group sessions and online survey, stakeholders have noted, suggested, or indicated that the following areas / items are possible opportunities for growth of Snohomish County tourism:

Biking Trails, Facilities, Infrastructure, Amenities and Transport – there may be an opportunity to significantly increase biking related visits thru the development and enhancement of signature bike trails (such as Centennial), new bike trails, biking facilities, infrastructure, amenities and transport.

Branding – there may be an opportunity to educate / re-educate industry players about the brand (Open Up) and engage them to use and / or better implement the brand.

Capacity Building – there may be an opportunity for the county and the Tourism Bureau to provide tourism capacity building services to towns, cities, organizations and private sector operators, especially SMEs to help build, enhance and grow their tourism products and services. Hoteliers may also benefit from orientation to existing tourism activities that are available to their guests.

Cascade Loop (Signature Attraction) – there may be an opportunity to enhance / highlight the Cascade Loop as a Signature Attraction that all visitors to the Pacific NW must take.

Commercial Air Service – there may be an opportunity to increase Snohomish County tourism as a result of direct air access to Paine Field. The connection and synergies between commercial air access and Snohomish County tourism needs to be better understood and planned.

Events & Festivals Strategy – there may be an opportunity for Snohomish County to create a countywide Events & Festivals Strategy that engages the county, towns, cities and stakeholder groups to develop, schedule, enhance, incubate, direct, market, promote and manage a portfolio of events and festivals for residents and visitors alike.

Food Trucks – there may be an opportunity to work with the Food Truck Association and Snohomish County Dept. of Health to increase the numbers of food trucks in Snohomish County - especially East County.

Harbor / Boating Tourism – there may be an opportunity for greater focus on harbor visits in Everett and other Snohomish County ports / marinas as well as increasing boating / sailing tourism in general.

International Visitors – the market for international visitors (Asia/Pacific, Europe, China etc.) is growing to regional destinations such as Seattle, Portland and Vancouver BC, as well as to local attractions / activities such as the Boeing Tour. Snohomish County needs to be prepared to deliver broader visitor opportunities and culturally sensitive service to these international visitors. There may be an opportunity for the SCTB to produce and distribute a foreign language friendly website and various marketing materials to this growing market.

Information Centers and Distribution – there may be an opportunity to enhance visitor information distribution thru alternative sources / locations as well as online and mobile applications.

Institute of Flight and Boeing Tour – The Institute of Flight (an independent, 501(c)(3) nonprofit organization) manages the airport facility that contains the Future of Flight Aviation Center and is the front and back door to the Boeing Tour. The Future of Flight facility is partially funded by the Snohomish County Public Facilities District. Although the Boeing Tour and the Future of Flight Aviation Center cohabitate, their missions and objectives do not necessarily or always align. Based on conversations with stakeholders:

- The facility may require new / greater investment to keep up with traffic / parking growth and demand for exhibits that are up to date, attractive and engaging. Current standards for non-Boeing elements are not satisfactory.
- The county may need to engage a professional museum / retail / operations consultant to review existing facilities, operations, exhibits and shops to create a forward-looking strategy.
- The county may need to re-assess the PFD status of the Aviation Center to determine if the current management structure is the best use of resources.
- The Future of Flight Aviation Center may be confusing to visitors who are primarily there to take the Boeing Tour.

- The revenue sharing arrangement between the Institute of Flight and Boeing is confusing and may require clarification and greater transparency.
- Connectivity between the Future of Flight Aviation Center and the Historic Flight Foundation, Paul Allen's Flying Heritage Collection, and the Museum of Flight Restoration Center may require future assessment to fully realize the potential of all aviation attractions.

Locally Made – there may be an opportunity to assist local artisans, SMEs, agritourism providers, breweries, distilleries, and other “local” businesses to create and market locally made products that attract and appeal to visitors.

Mountain Loop Highway – there may be a significant opportunity to increase Snohomish County tourism by paving the remainder of Mountain Loop Highway.

New Developments / Parks – there may be an opportunity to celebrate and facilitate new developments and parks in Snohomish County including, but not limited to, Japanese Gulch, where the City of Mukilteo has recently released a new Master Plan and the Port of Everett's Waterfront Place Central redevelopment project, which is set to unify the marina and surrounding property with a sustainable and unique commercial, recreation and residential community.

Tourism Focus / Identity – there may be an opportunity for Snohomish County focus greater tourism development attention on a short-list of activities / identities such as: Outdoor Recreation, Seattle's Backcountry / Playground, Aerospace Capital, etc.

Trails and Trail Town Connectivity – there may be an opportunity to focus and apply greater resources and attention on recreational trails (land and water) and trail town connectivity and development in Snohomish County to realize even greater return on investment.

Visitor Itineraries – there may be an opportunity to better promote “itineraries” to provide more options and ideas for people visiting Snohomish County. Itineraries might include: culinary, breweries, biking/hiking, antiquing, farms, arts, historical sites / assets, nightlife, etc.

Water Trails / Biking Trails / Hiking Trails – there may be an opportunity for greater development, utilization and tourism impact from Snohomish County recreational trails such as the Skykomish-Snohomish Rivers Water Trail concept, Whitehorse Trail and others.

Threats

In the interviews, group sessions and online survey, stakeholders have noted, suggested, or indicated that the following areas / items are possible threats to growth of Snohomish County tourism:

Exchange Rate – there is a significant threat posed to Snohomish County tourism resulting from an unfavorable exchange rate with the Canadian dollar.

Washington State Tourism Office – although Snohomish County does not have influence over the Washington State government agenda, agencies or funding, the closure of the Washington state Tourism Office in 2011 may have created a competitive threat for Snohomish County tourism vis-à-vis other counties in other states that do have a statewide tourism office.